

UNIVERSITY OF TARTU
Pärnu College
Department of Tourism Studies

Violaine Malié

**DEVELOPING THE ATTRACTIVENESS OF THERMAL
WATER BASED HEALTH TOURISM**
A Comparison in Champagne-Ardenne Area, France

Master thesis

Supervised by Dr. Laszlo Puckzo, PhD
&
Co-supervised by Dr. Melanie Smith, PhD

Pärnu 201

Recommendation for permission to defend thesis

.....

(Supervisor's signature)

.....

(Co-supervisor's signature)

Permission for public defence of thesis granted on 2014

Head of the Department of Tourism Studies, Pärnu College of the University of Tartu

Heli Müristaja

This Master thesis has been compiled independently. All works by other authors used while compiling the thesis as well as principles and data from literary and other sources have been referred to.

.....

(Applicant's signature)

TABLE OF CONTENT

Introduction	4
1. Thermal water based health tourism	8
1.1 History and development of thermalisme and related travelling	8
1.2 Future trends of thermal water based health tourism	9
1.3 The main fluctuations in thermalisme since 1947	13
1.4 Developing attractive thermal water based health tourism products and services	17
2. The research: study cases in France	20
2.1 Introduction of thermal sources researched	20
2.2 Research methodology, process and limitations	26
2.3 Market analysis	31
2.3.1 Champagne-Ardenne market potential	32
2.3.2 Survey and interview analysis	39

3. Research findings and recommendations.....	42
Conclusion	52
Appendices.....	54
Appendix 1: Sermaize-les-Bains overview in pictures	54
Appendix 2: Survey and local interview	57
Appendix 3: In-depth interviews.....	59
References	61
Résumé en Français.....	65

INTRODUCTION

Origins of thermalisme, the use of natural and mineral waters for therapeutic purposes goes back to the Gallo-Roman times. Along the years, this approach encountered many fluctuations in its popularity but also credibility, often put in doubt. After being forgotten and abandoned for centuries, it is in 1831 that the practice came back and proved itself with the opening of modern and developed thermal centres.

Even though the use of waters dates from 3000 B.C, the History of thermal baths starts in the Antiquity time in Greece (Chagnon, A. 2009), with an hygienic purpose. Slowly, thermal baths took a social turn and the architecture of the baths started to be developed and more detailed in order to make thermal centres as a community area for socializing. With the Roman occupation, thermal baths were built all over the Roman Empire. In 1604, the first "Mineral Water Chart" is signed by Henri IV, King of France at the time. At the end of the XVIII century, constructions take a monumental turn; thermal centres became the biggest establishment while thermal sources were sheltered by small pavilions and kiosks. In France, Napoleon III and his family tastes for thermal towns played a determining role in the thermalisme boom after 1850. The peak of this revival was reached in Vichy in the end of the century with the realisation of Charles Lecoeur projects (Chagnon, A. 2009).

Today, France is the third thermal country after Germany and Italy, with an amount of 570 000 curistes per year for 115 thermal stations. Rheumatology and airway diseases are the most common prescriptions for thermal cures, with 80%. Each run mineral

source must be authorized by a ministerial decree, and each thermal centre needs to be specialized in one or several pathology in order to be authorized by the French National Social Security.

Champagne-Ardenne area in France would not be the first destination that people would have in mind for thermalisme today; however, it used to be a very sought-after place in terms of thermal waters. The two study cases researched in this thesis will be two thermal stations located in the Champagne-Ardenne region in France, Bourbonne-les-Bains and Sermaize-les-Bains, both in the same geographical area. Both places carry a vast history and went through a lot of historical and important events to be what they are and are not today. The study cases were very interesting to research as the two stations will bring out different types of waters and healing properties, the same geographical advantage but still remains successful for one and not for the other. According to the previous literature review, the author can conclude that many researches regarding the development of thermal stations have been done and studied, but only a few of them focus on the market appeal of these stations and no comparison have been made between success and failure of thermal centres. The study can then on contribute to improvement and/or development and attractiveness issues of thermal stations in France but also abroad.

The title of the Master thesis is: " Developing Attractiveness in Thermal Water Based Health Tourism: A Comparison in Champagne-Ardenne Area, France". The problematic question of this thesis is: How to revitalise Sermaize-les-Bains thermal station and make it more appealing to a potential clientele?

The author of this thesis will research what the key factors playing in the development of thermal water based health tourism sector are and then on formulate hypothesis with regards to the existing literature, theory and general knowledge in the thermal water based health tourism in France: the commitment and knowledge about the thermal potential of Sermaize-les-Bains source (first study case) is insufficient and cannot move towards a positive development of the thermal project in the town. The overall aim of

this thesis paper is to research and compare the two study cases previously mentioned, in order to demonstrate why one station is running efficiently and the other is left to abandon. The study objective will be to provide recommendations on how to solve the development issues of the thermal station of Sermaize-les-Bains. Outcome will be provided according to the market analysis presented further.

In order to reach the objectives and the aim of the thesis, the thesis' author conducted several study researches. Theoretical background and general definitions regarding the thermal industry and thermal water based health tourism more specifically will be further introduced in the paper. The historical background of the two study cases will also be briefly introduced in order to get a better overview of their respective market position today.

The main research method chosen was a qualitative study method. The interviews were semi-structured open questions with interviewees being encouraged to talk generally about the thermal water based health tourism development and the market appeal, giving their own opinion on the topic. The interviewees were managers, town Mayor, thermal doctors and local entrepreneur, all based in France. In addition to interviews, an observation method took place in order to collect information for the research; this method was conducted by visiting the old Sermaize-les-Bains thermal area and observing the architecture area and the features. Regarding analysis of the primary data, content analysis method was chosen. The author also chose to include a quantitative method to the research for the market analysis. Survey was taken among people residing in Champagne-Ardenne area. Communication channels for the survey were social media and local tourism office database. 60 people answered to the survey.

Thesis is divided into three main chapters: the theoretical and historical background regarding thermal water based health tourism, introducing a study of the future trends of thermal water based health tourism, the main fluctuations and the development of products and services in this field; research conduction and analysis part; findings and recommendations part where the outcome of the thesis will be presented. The last part

of the thesis consists in the conclusion, references list, appendices to feed into the thesis and a summary in French language.

Presenting research findings are going to be suitable for thermal towns whose thermal sources are abandoned, and who are interested in investing and developing the thermal area of their municipality again, recovering the pleasure of the mineral waters.

1. THERMAL WATER BASED HEALTH TOURISM

1.1 History and development of thermalisme and related travelling

At least until the XIX century, medicine was not always able to assure a safe recovery and therefore, people looked for miraculous beliefs linked to the environment as the right link between patients and preternatural world where medicine had failed.

Among environmental factors, the most important is undoubtedly water, the historical miraculous source. The search of health has always been linked to the presence of water, such as thermal baths, which became since the XIX century spas for treatments and regulation of functions of human organism. Water has always been seen as a particular element in this healing system.

The curative use of thermal water is mentioned for the first time by Philostratus, in relation with injured Achaean warriors who, coming back from Troy, dipped as therapy in the thermal sources in Smirne, which were later called “Agamemnon’s Baths”. The connection between thermal and curative water sources and volcanic phenomena was established. The quality of water and its temperature are exclusively connected to the geological structure of the soil where it flows, and a mythical link between health and

volcanism is attributed by these ancient people.

Thermalisme, a popular source of healing, became a social phenomenon of these times. It was the Romans who maximised hydrotherapy, attributing to it a collective and public aspect. Thermal sources were exploited in many European countries although people were still linked to local healthy Gods. To mention are: Badenweiler spas in the Black Forest (80 A.C.), the famous Aquae spas (today's Baden Baden) which became later "Aquae Aureliae". In France spas were appreciated by people who had already tested abroad the effectiveness of water treatment. Of note, in Britain, it is the spa in Bath, which is still operative.

Thermalisme tends to have two directions, therapeutically, with the medical side and control centres and socially with special areas for men and for women where they could relax and have some chat with other people.

Travelling has always been part of health tourism, even when related to waters. People have been travelling for centuries in the name of health, from ancient Greeks and Egyptians who flocked to hot springs and baths directions. During the 18th and 19th century, Europeans and Americans who journeyed to spas and remote retreats hoping to cure ailments like tuberculosis. By definition, health tourism is the travel of people to another country for the purpose of obtaining medical treatment in that country (Horowitz, 2007). Traditionally, people would travel from less developed countries to major medical centres in highly developed countries for medical treatment that was unavailable in their own communities, but the recent trend is for people to travel from developed countries to third world countries for medical treatments because of cost consideration, though the traditional pattern still continues.

1.2 Future trends of thermal water based health tourism

When talking about future trends in thermal water based health tourism, it is important to first be able to define all the different type of structures in this field. Today, we tend to confuse spa, medical spa, thermalisme, but also thermoludisme, quiet a new concept in this industry. A few brief definitions of all these different activities will be necessary to go on with the topic of this thesis.

The word "spa" conjures up images of long days filled with mud baths and meditation classes, exquisitely prepared spa cuisine, and fragrant eucalyptus groves. At a day spa, clients just drop in for treatments like massage, facials and body treatments. Often, day spas are an extension of a hair salon, which is fine as long as the spa is a separate wing that offers a quiet and serene environment. The International Spa Association defines spas as "places devoted to enhancing overall well-being through a variety of professional services that encourage the renewal of mind, body and spirit." There's also a huge range of experiences at resort spas. Again, no one is regulating the use of the name, so it could be anything from one massage room next to the fitness centre to a multi-million facility.

The medical spa, also known as the next generation of the spa industry, is a hybrid between a medical clinic and a day spa that operates under the supervision of medical doctors. Medical spas can treat conditions on your face and body like brown spots, redness, and broken capillaries that cannot be treated at all or as effectively by a traditional aesthetician.

Thermalisme is medical-related and of course associated with well-being. It is an alternative medicine as no medications are provided. A thermal bath is a warm body of water, often referred to as a spa, which is traditionally used to mean a place where the water is believed to have special health-giving properties. A thermal bath may be part of

a destination spa or the reason that a spa town exists. It is used as cures, where people go to attend it from generally one to three weeks of treatments, in order to heal diseases or skin problems for example.

Most of the thermal stations were created between 1850 and 1900, in order to answer a specific demand (Moisset, P. 2011). All of them organised themselves on the same town planning and architectural principles targeting an existing identified type of clientele. The architecture and urbanism organise the thermal station around four key elements which consists in the visual attraction pole and the heart of social and cultural activities: the thermal area, usually an emblematic building, the casino, the hotel and the parc, which plays an important role in the re-education part of the cure for patients (Moisset, P. 2011). Beyond these four main elements, some other functions are found such as shops, other hotels, furnished accommodations and also - depending on the urbanisation rhythm of the town- permanent accommodations, industrial areas and leisure spaces not dedicated to the thermal station (Moisset, P. 2011).

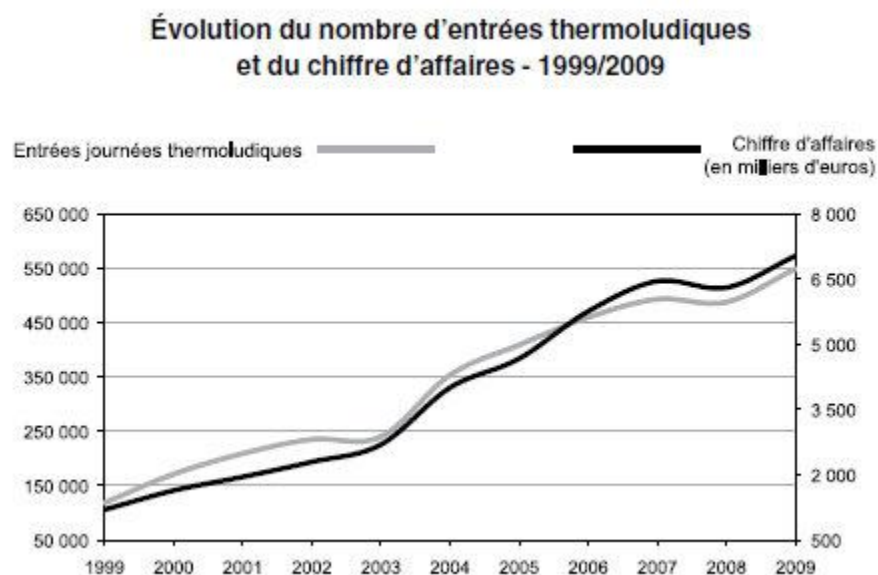
Today, spas have become more popular, attracting more clientele, due to the fact that wellness is necessary in relation to modern social conditions. Thermalisme in France had developed an image associated with old age, being more dedicated to treating older people with health problems.

From this, a new concept was created “thermoludisme”, which is today the most popular in France in term of wellness. Thermoludisme was first created in the 80's in Germany (Afreth, 2008) in order to diversify the thermal activity. The main objective was to create new customer behaviour, enjoying the pleasure of the waters, working all year round and get a new image for this form of wellness.

Whereas thermalisme concentrates on medical purposes only, thermoludisme offers wellness and leisure balance. In thermoludique centres, clients would be able to enjoy the pleasure of natural waters like in thermalisme centres, but with an additional wellbeing factor.

Thermoludisme doesn't have the vocation to replace the traditional thermalisme; it radically stands out from this concept and requires different dedicated and specific equipments. Also, far from being a direct competitor for therapeutic thermalisme, thermoludisme is also seen as a springboard for local economy, by providing permanent jobs during all the seasons for example.

The creation of thermoludique centres in France started at the end of the 2000's and had for objectives to create a complimentary activity to the therapeutic thermalisme. Somehow, this started to give a new image of waters for people that would have a negative perception of it.



Graphic 1: Evolution in the number of *thermoludiques* stays and turnover from 1999 to 2009. (Mission Thermalisme – CRT, 2010)

On the graphic 1, it can be observed in black, the turnover (in million of €) and in grey the number of day entries to a thermoludique centre in France, in 2010. The increase is clearly noticeable. Thermoludique centres bring lots of customers even today with the crisis.

The diversification process in thermalisme can from now on be defined according to two main segments (Moisset, P. 2011):

- ✓ a medical approach, which is more about new services dedicated to the traditional clientele for conventional cures, such as therapeutic education and amongst over, the "*bien-vieillir*", which would be the act of getting ageing gracefully;
- ✓ a touristic approach, which is presented as another form of water usage and thermal treatments, taking the form of "free cures", wellness and thermoludisme oriented, offering various different activities with the waters but not being linked to the medical and therapeutic aspects.

The topic of this thesis will stay oriented toward the medical and therapeutic thermalisme. All the other type of structures won't be included in the research part.

1.3 The main fluctuations in thermalisme since 1947

Since human discovered the properties of mineral waters more than 2000 years ago, thermal medicine has demonstrated its efficiency on several different ailments such as dermatitis, allergies, asthma, metabolic dysfunctions, osteoarthritis, rheumatisms, etc... . France has more than seven hundred beneficial water sources with therapeutic properties which have been officially recognized by the French Medicine Academy.

This therapeutic approach is more relevant than ever to help face the increasing life expectancy, chronic diseases, and poor life quality of modern times.

With regards to history, two important crises affected the thermalisme world since its discovery in France. Firstly, June 19th, 1947 represents an important date in the history of French thermalisme (Jamot C., 1988). On this date the convention between thermal associations and the French National Social Security system was signed, which granted subsidiaries to people using thermal cures, based on the type of illness and treatment

they had. However, details of this period between 1947 and 1952 remains vague due to a lack of information (Jamot, C., 1988).

From 1948 to 1952, the popularity of thermalisme begins to grow. A sharp increase in new clients is observed, most of them tourists from the pre-War period. Even with the new convention between French National Social Security and thermal associations, it is not feasible to consider an overnight explosion in their popularity. The convention have only seen an increase one year later, and even then a slow rate.

After 1952, we see a pattern of peaks and dips in popularity affecting the field of thermalisme, and referring to statistics from the French National Social Security and insurance details of people attending these treatments, we can observe that the trend emerges between 1950 and 1953, with an increase of about 20% each year.

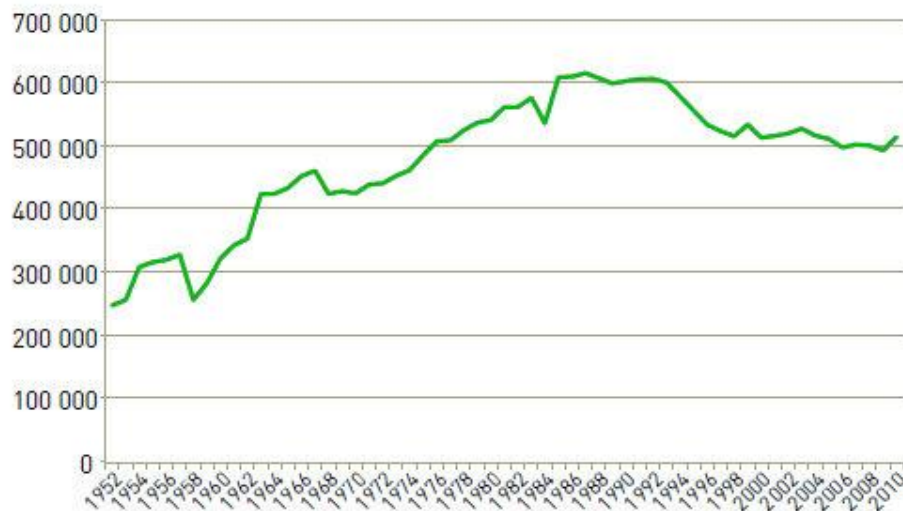
This development is due to two phenomena, the progression of 'free curistes' (there were 175,000 in 1955) to state insured people. This continued to grow after 1960 due to the increase in state-insured clientele with a widening social profile.

Between 1952 and 2010, the number of thermal cures as listed by the board of tourism management peaked at 600,000 in 1988 when only 246 000 in 1952 (Moisset, P., 2011). The crisis between 1959 and 1968 which saw a dramatic decrease in the government's public expenditure shows the independent attitude of curistes regarding the French National Social Security subsidy. Public governmental policy for thermalisme also affected the industry, with regards to cohesive official guidelines for thermalisme in line with the views of thermal doctors (Moisset, P., 2011).

In 1958, thermalisme encountered its second major crisis which lasted three years, seeing an average annual decrease of fifteen to twenty percent in terms of visits. The main reason for this was the sudden changes made by the French National Social Security, which modified the convention of 1947 by reducing the subsidy provided for treatments and ignoring accommodation and transport considerations. The changes also

meant that people using thermal cures should have a prescription from a doctor in order to do so, and these cures could not be undertaken during paid holiday leave; rather, a second unpaid holiday had to be used. This was repealed in 1960 (Moisset, P., 2011). Political reasons also played a minor role in the popularity of thermalisme, which had to wait until 1977 to see a return of its fortune (Jamot, C., 1988).

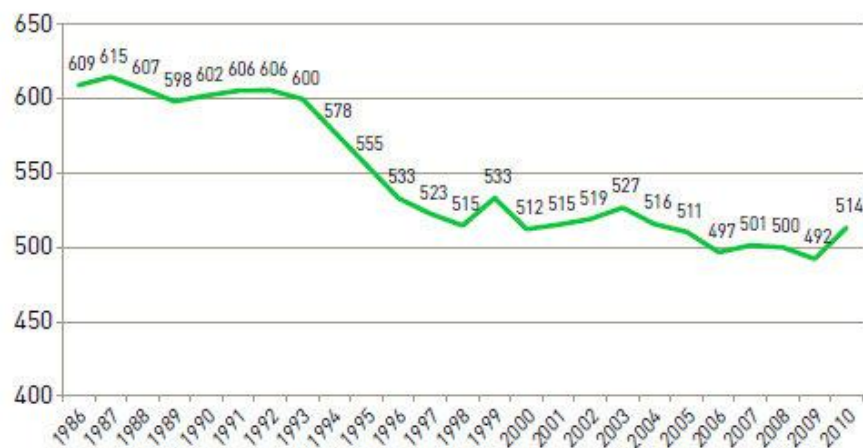
Évolution du nombre de cures conventionnées de 1952 à 2010



Graphic 2: Evolution in the number of conventional cures from 1952 to 2010 (Source: Christian Jamot, 1952-1985 and CNETH, 1985-2010).

It can be noticed, according to the graphic 2, that between 1952 and 1990, the number of conventional cures kept increasing. This phenomenon is due to the 1947 convention signed between thermal stations and the French National Social Security. It can be noticed as well that from 1990, the decline slowly started.

Évolution du nombre de cures conventionnées de 1986 à 2010 (en milliers)



Graphic 3: Evolution in the number of conventional cures (French National Social Security) from 1986 to 2010 (in thousands). (Source: Moisset, P., 2011)

When having a deeper look to the period 1986 (post-decline) to 2010 on the graphic 3, it can be seen that the number of visits started decreasing importantly from 1992, and are quiet stable since then. Today, the popularity of therapeutic thermalisme still fluctuates (Afreth, 2012). The range of ailments treated has grown, yet it suffers from an old-fashioned and even out-of-date image.

The second crisis occurred in 1986 and continues to this day (Afreth, 2014). The “Conseil National du Tourisme” struggles to explain the situation. The beginning of conventional thermalisme decline began in 1993, after a stagnant period between 1985 and 1992 where thermal stations lost 100,000 curistes per year. This decline began to lessen in 2007, however it still fluctuates (Afreth, 2012). The range of treatable ailments has widened, although overall the industry suffers from an old-fashioned image which borders on being 'out of date'.

1.4 Developing attractive thermal water based health tourism products and services

In France, thermalisme is medicinal by definition. While thermal centres in other countries are polyvalent and more orientated towards general wellness, in France, each one has its own specialization: this is based on the mineral composition of the water. Twelve of these orientations have been scientifically defined (Cour des Comptes, 1995) and therefore each thermal installation will offer services according to the patient's specific needs. Rheumatology and osteo articular trauma consequences, airway disease, metabolic and digestive system disease, gynaecology, dermatology, metabolic and urinary system disease, phlebotomy, psychosomatic ailment, child development issues, neurology, cardio-arterial disease, bucco-lingual mucus membrane ailment are the specializations of thermalisme in France.

Even though the use of mineral waters are not subject to any prescription (based on the 'free use of waters' decree, article 15, 28 January 1860), 9 out of 10 thermal cures are prescribed by doctors and undertaken in a controlled environment (Cour des Comptes, 1995). The lengths of treatments are fixed between 18 and 21 days under the FNSS system, which is the minimum length necessary for the medicinal effectiveness of the treatments. Treatments undertaken for 'wellness' are shorter and not covered under French National Social Security as they are considered as thermoludique (Cour des Comptes, 1995).

The treatments can be a service or a product which can be physical or virtual (such as follow-up on patients through online questionnaires after and/or before the cure) and the price may vary according to quality, demand, and the considerations of the market. Each product has a lifespan, after which it will need to be replaced, and a span of usefulness, after which it will need to be redesigned (The Economic Times, 2014). The author will mention here as an illustration, the thermal cure that will have medical improvement on the patient but which need to be reiterated in order to improve the health of the patient but also the quality of the service given.

Marketing medical tourism and products differs from retail marketing of tangible goods (IMJT, 2010). In thermal water based health tourism, product differentiation mainly centres on the product quality and specialization, and leads companies to look at a patient's overall consumption, including how they acquire and use goods and services (IMJT, 2010). This means that thermal centres must analyse their demographic in order to properly evaluate the perceived quality, value and price.

The thesis' author believes that in the modern thermal industry, marketing plays an important role in the distribution of products and services as it retains an old-fashioned image. Thermal managers are now considered medicinal professionals, and the scientific efficacy of thermalisme has been proven for several illnesses. However, the old-fashioned image of thermalisme still has a negative effect on the field however the medicinal status of thermalisme (weight problems, back problems etc), innovations in treatments, modern and comfortable centres, partnership packages with hotels and the high quality environment are arguments for its progress (Afreth, 2012).

Marketing short cures encounters many obstacles relating to the naming of products and perceived similarities with 'spa' treatments. In order to correctly identify treatments and refer to them as such: 'thermal spas', 'free cures', 'wellness', 'wellbeing', 'regaining your health' ...etc., an official glossary of therapeutic indications is needed within the protean concept of 'spas' and to a lesser extent, thermalisme.

Valvital is a good example of development within the field of thermal products and services. They have reinforced the accommodation around thermal centres with the construction and management of new residences in Thonon-les-Bains (Valvital, 2014) with plans for Lectoure, Santenais and Divonne-les-Bains. Continued research into medical efficacy has led to improvement in services notably those aimed at seniors, and also a range of cosmetic treatments and products based on thermal waters such as the existing brands Avène, Uriage and Laroche-Posay which have seen a success.

A good example for products and services development in the thermal industry, Avène was a pharmaceuticals group created in 1961 by Pierre Fabre who wants to show a modern and scientific thermalisme today.

Eau Thermale Avène is a French derma-cosmetic brand dedicated to every level of skin sensitivity: Allergic, intolerant and sensitive. Each product contains the Avène Thermal Spring Water, a unique active ingredient whose properties have been endorsed by dermatologists over the years. Extremely low in minerals and rich in silica and trace elements, the Avène Thermal Spring Water has been clinically proven to be naturally soothing, anti-irritating and anti-free radical. The aim of Avène group is to offer customers the best possible products to alleviate skin concerns without the need for a drug prescription. This is where the concept of Derma-Cosmetics comes from – pioneered by Pierre Fabre – products dedicated to sensitive or vulnerable skin unlike traditional cosmetics which are suitable for healthy skin. The team of researchers includes Doctors, Dermatologists and Pharmacists who test and formulate the products as if they were medicines, putting science behind every stage of a product's development.

In terms of development, Avène's main difference lies in the design and development of effective products based on the same drugs standard model. Through repeated partnerships with public and private research institutions, their derma-cosmetics research teams have acquired undeniable expertise in the area of dermatology. Last year alone, over 1,000 clinical studies were conducted worldwide with the help of top international specialists. This approach contributes to the development of new concepts, exploration of new techniques and progress in their knowledge of the skin.

2. THE RESEARCH: CASE STUDY OF FRANCE

2.1 Introduction of thermal sources researched

In the empirical part of the thesis, the author will present a survey of in-depth interviews and display illustrations from the latter.

Interviewees were chosen according to their role and functions in the thermal centres. Two hot sources will be researched on the basis on their success, one having been very successful and the other having been abandoned for many years. The author conducted interviews with doctors as well as with managers.

The Valvital thermal centre is located in Bourbonne-les-Bains, a city boasting history, culture and refreshing thermal waters (Office de Tourisme Bourbonne-les-Bains, 2014). The renowned water sources originates from Antiquity and covers more than 4000 square meters and still constantly evolving to this day. The water from the source has been scientifically recognised and is hyper thermal, rich in salted minerals, and naturally hot at 66 degrees Celsius.

The thermal centre originates from 1735 with the construction of the Royal Military Hospital and the opening of the first thermal centre from 1783, which started the thermalisme era of Bourbonne-les-Bains. The preliminary constructions of the modern thermal centre from 1783 led to the discovery of the archaeological shape of the main

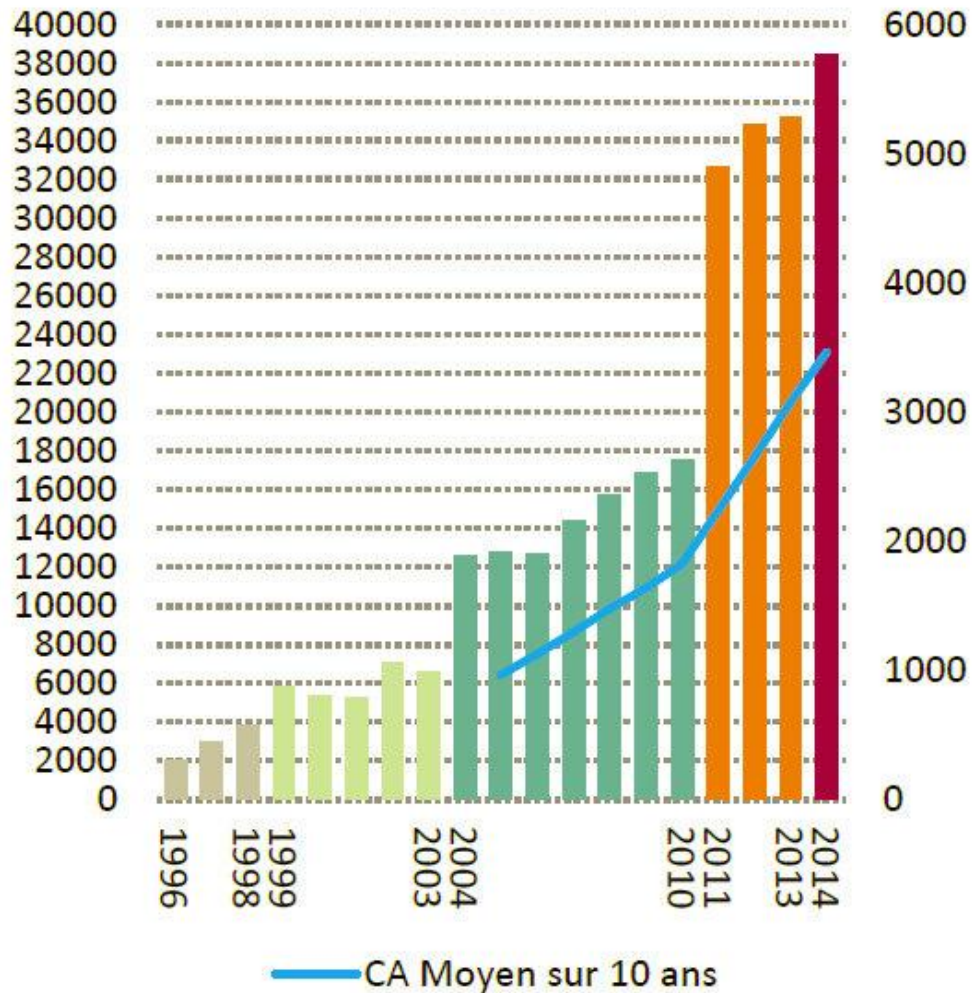
water source, built in ancient times, comprising of two vaulted steam rooms and a pool lined with lead. Man-made access to many different pools was also found during this time (Valvital, 1989).

The constructions of the railway system at the end of the XIX century brought more and more visitors to Bourbonne-les-Bains, which had gained a reputation as a healing centre (Office de Tourisme Bourbonne-les-Bains, 2014). The new thermal centre was built between 1977 and 1979. New constructions started and many changes were made, even though archaeologists did their best to keep as much as possible of the oldest thermal sanctuary of the northern part of Gaulle. The new centre completed in 1979, it became available for curistes. From then on, Bourbonne-les-Bains received a high number of visitors, with a record of 16 000 curistes in 1986, and subsequently becoming the most important thermal station of the North East of France (Office de Tourisme Bourbonne-les-Bains, 2014).

In 1989, Valvital was founded by Bernard Riach (Valvital, 1989) in France, a new group that would bring together all the best thermal centres of France. In 2004, Valvital group obtained an important contract with the bank *Crédit Agricole* and saw its potential grows. With this new income, Valvital bought Bourbonne-les-Bains, which allowed the group to extend and develop its strategies in terms of thermal industry (Valvital, 1989). Bourbonne-les-Bains was the first big acquisition for the group.

Since 2004, Bourbonne-les-Bains has been part of the Valvital Group and has been under renovation. When Valvital first acquired the thermal centre, the latter was welcoming around 10 000 curistes per year. Then on, the stations grew, but with the crisis in 2010, the number of curistes decreased to 7909 curistes in 2013 (CNETH, 2013). The thermal centre is today focused on osteoarthritis and osteoporosis with powerful waters for bone strengthening (Valvital, 1989). In 2013, out of 7909 curistes, 7392 were clients treated for rheumatology and 517 for airway disease (CNETH, 2013).

C.A. NET STATIONS CEB - K €
(Valeurs estimatives pour 2014)



Graphic 4: Turnover for Valvital group over 10 years (Source: Valvital, 2014).

Sermaize-les-Bains is the second study case of this thesis. It was chosen as it was one of the first important and recognized thermal sources in France, with an excellent location between Paris and the German, Belgian and Luxembourgish borders. This source has a

long history, so only key moments will be examined in order to further understand the case study.

The official history of the Sermaize-les-Bains LB waters starts in 1093 (Martinet, A. 1992). Its first major reference was in the 1696 treaty *'Traité sur les eaux minérales d'Attancourt en Champagne, avec quelques observations sur celles de Sermaize'* by Edme Baugier. The author of this treaty contested that he had witnessed the healing powers of the water at the site (Martinet, A. 1992). The reputation of Sermaize grew as it received more and more attention from publications and articles which mentioned its properties. In 1779, Francois Menard parish priest obtained permission from the Champagne-Ardenne district to build an official road leading to the source, improving access for the populace. Between 1787 and 1789, a thermal centre was built around the source, thanks to the financial supply made by local investors.

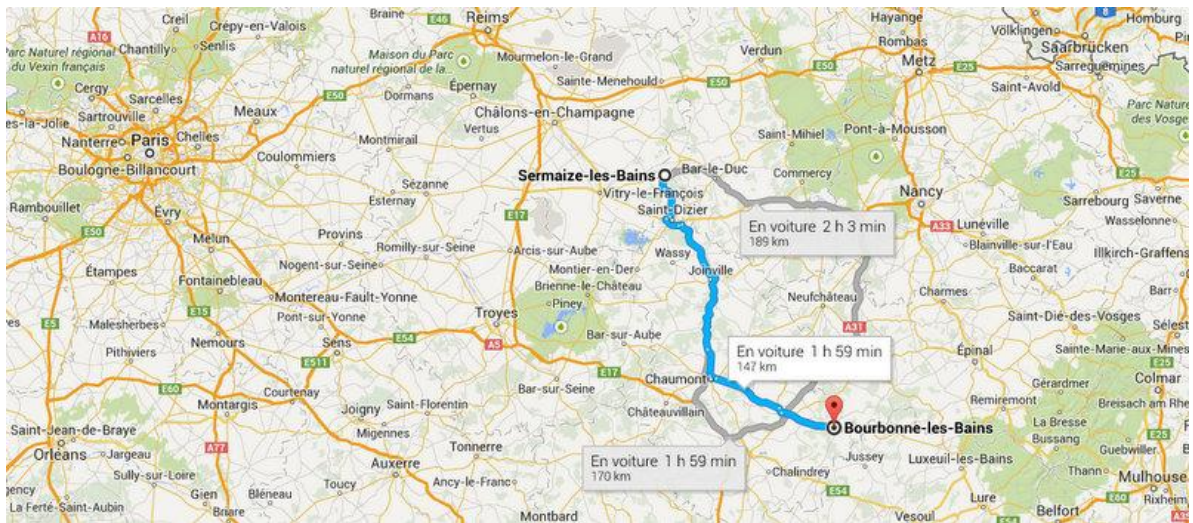
On May 14th, 1851, the official "Sermaize Mineral Waters Society" was founded, consisting of 21 members and led by Alfred Leger Hippolyte. Baths and kiosk were built around the area (see Appendix 1), and measures taken to protect the mineral source. These provisions led the source to be officially recognized by the French Minister on April 2nd, 1852. The Sermaize Mineral Waters Society sold the thermal area to the local municipality for 20,000 francs a few weeks later (Martinet, A. 1992).

On November 19th, 1896, the denomination of the municipality was changed due to the development of the thermal source. The town formerly known as Sermaize became Sermaize-les-Bains. The construction of the national railway also played an important role in the development of the hot source at Sermaize, thanks to the opening of a direct line to the municipality, with tickets costing only three francs. This was a success and with the market growing in France, people came from all over the country to try the waters. Balls, concerts and military events were frequent and the place which became a social thermal area. From then on, the entry to the source would be free of charge for the military and an official price list was established for the public. In this period,

we notice the beginning of the notion of "cure"; Sermaize thermal centre offering a cure of twenty-five days for ten francs or a cure of ten days for five francs. Admissions for just the baths or a half-day were also available, as well as the hire of equipment/extras such as towels or bathrobes (Martinet, A., 1992).

In 1854, a hotel is built by Mr Michel a local pharmacist, named "*L'hôtel de la Source*" (see Appendix 1). He then became the manager of both the hotel and the source. Despite his efforts, he did not succeed in turning a profit. The number of curistes had been increasing but remained insufficient: seventy-five curistes in 1855, one hundred and fifty in 1856 and one hundred in 1860. Mr Michel died in 1866, leaving his widow who could not afford the running of the thermal centre. The place is then left to the municipality council. Over the years, there was much conflict between the municipality and the Sermaize Mineral Waters Society. The source was heavily affected by these conflicts, leading to poor site maintenance but an increase in prices. In addition to this, curistes no longer came to this site to enjoy the waters.

During the First World War, Sermaize-les-Bains was heavily bombarded and the town itself was entirely destroyed, with the source as the only place remaining intact. The source was then turned into a hospital for French soldiers. The thermal season recommenced slowly after the war but had grown by the time of the Second World War. The source was then used as a storage space for military equipment. In July 1944, the thermal centre was taken over by the German army, who used it as a school for young people. In 1954, the Americans took control the thermal area, which further increased the deterioration of the site (Martinet, A., 1992). The most recent change appeared in 1983 when the thermal centre was sold to a local family. They opened a nightclub and a bowling centre; all the other annexes such as the hotel and the source remained abandoned and closed. Opened in November 1983, the nightclub was a success among the younger generation of the Champagne-Ardenne area. Many different projects for the thermal source were planned, but none of them took place due to lack of financial support (Martinet, A., 1992).



Map 1: Geo-localisation of the two thermal sources researched (Google Map, April 2014).

As it can be seen from Map 1, the two thermal stations studied are located in Champagne-Ardenne area in France, in the same geographical area, 147km for each other. The thermal station of Bourbonne-les-Bains is the only thermal centre running in this area of France, and Sermaize-les-Bains source the only other thermal source of the Champagne-Ardenne area.

The author collected 4 interviews which were conducted during her studies between 2012 and 2014. The answers to the interviews were conducted and analysed according to the theory (see Chapter 2.3). The interviews were transcribed in Bourbonne-les-Bains and Sermaize-les-Bains during the interviewing process. All the interviews were recorded on the phone or via e-mail and further transcribed by the author via e-mail (See Table 1, Chapter 2.2). In this thesis, interviews were semi-structured as the theme of thermal centre success and failure is not clearly defined. The next chapter will present a profound overview of the research methodology and the whole process of qualitative survey for in-depths interviews and quantitative survey regarding the market analysis.

2.2 Research methodology, process and limitations

The topic of this research, attractiveness of thermal water based health tourism, can be researched from various perspectives. Meaning that the topic could be assessed both with quantitative or qualitative approach. The author has used survey as the main research strategy and chosen the qualitative method for the study by using in-depth interviews (semi-structured questionnaires as data collection method - see Appendix 3). The main reasons for using qualitative type as a method for this research study is that qualitative method, such as in-depth interviews, gives a professional opinion regarding the market appeal of thermal stations today in Champagne-Ardenne area, and the key factors to their development. The in-depth interviews allowed the thesis author to obtain precise answers and even more sometimes to bring to the main research questions.

According to Flick (2011, p.14) another advantage is that with qualitative research, it is possible to produce detailed and exact analyses of few cases, in which the participants have freedom to determine what is relevant for them and to present it in its contexts. The disadvantage of qualitative study is that qualitative analyses takes a lot of time and the results can be generalized to the vast audience in only a very limited way (Ibid, p.14).

Even though it is believed that survey as research strategy suggests a piece of quantitative research (Biggam, 2008), in the case of exploring the idea of thermal attractiveness with keys to success and market appeal, it was necessary to pass through quantitative research as well for the market analysis. In this case, the “How” question, which is common use for quantitative research (Biggam, 2008) wouldn't be appropriate, when unexplained “What is it?”. However, it may be a good orientation and topic for further studies on this topic.

Survey is an investigation about the characteristics of a given population by means of collecting data from a sample of that population and estimating their characteristics through the systematic use of statistical methodology (United Nations, 2000). The author has chosen, according to the theoretical background, two contrasting thermal sources in the same geographical zone, which correspond to the data sample of the Champagne-Ardenne area population sampled in the market analysis.

Chosen thermal sources were the thermal source Valvital in Bourbonne-les-Bains and the thermal source "*Source des Sarrazins*" in Sermaize-les-Bains. Both sources are located in the same area in Champagne-Ardenne region in France. In this particular case of comparison, it was necessary to have two study cases from the same geographical area, in order to make a comparison of success and failure in a particular region. It was also important to collect a precise data sample of opinions from the same geographical zone. The author needed to target only specific thermal sources and due to that used convenient sampling (Biggam, 2008) as sampling method, which means selecting suitable thermal sources which are able to represent the two sides, continuous successful appeal to the client in the first case and the other lost its target market.

In-depth interview is a qualitative method of analysis, which proceeds as a confidential and secure conversation between the interviewer and the respondent. By means of a thorough composed interview guide, which is approved by the client, the interviewer ensures that the conversation encompasses the topics that are crucial to ask for the sake of the purpose and the issue of the survey. According to Biggam methods (Biggam, 2008), the flip side of using open questions is that they can be difficult for the respondent to answer and the interviewer might be tempted to give an answer that would either show the company in a good light in order to please, or say the first thing they have in mind, which will affect the results and therefore the research.

Depending on economical possibilities and further more on the availability of interviewees, the author succeeded to gather in total four in-depth interviews. From all of the four interviews, two of them were conducted online via e-mail correspondence and two by phone. The interview was first intended to conduct in English language, but as the interviewees' level of English was not sufficient enough for interpreting the questions, it was decided to change the interview language to French. Further on, all the interviews were conducted in French and results further translated by the author of the thesis into English language.

Organisation	Interviewees	Profession	Interview Time	Recording technique	Location of the company
Sermaize-les-Bains Administration	Mrs Martine MILLOT	Mayor of Sermaize-les-Bains	March 1st, 2014	Phone	Sermaize-les-Bains, France
Bourbonne-les-Bains thermal centre	Mrs Sylvie BARTHELEMY	Thermal doctor	April 1st, 2014	E-mail	Bourbonne-les-Bains, France
Medical Taxi - Local	Mr Bruno BROCARD	Entrepreneur	April 23rd, 2014	E-mail	Sermaize-les-Bains, France
Valvital Group	Mr Olivier BRUEZ	Development director	May 17th, 2014	Phone	Aix-les-Bains, France

Table 1: Thermal companies and interviewees (created by the thesis author).

The first pilot was held on March 1st, 2014, with the Mayor of Sermaize-les-Bains, Mrs Martine Millot, in order to see whether the questions formed and the interview will have preferred results. It was seen that the results were satisfying, and no questions were further changed after the pilot interview. Surveys were however adapted according to the study case structure. Conducting a pilot survey was helpful as it helped obtaining a

clear idea and vision whether the questions were appropriate and related to the research aims (Veal, 2011).

The second interview was made on April 1st, 2014, with Mrs Sylvie Barthelemy, a thermal doctor in the thermal station of Bourbonne-les-Bains. Interview went on well and Mrs Barthelemy was able to provide lots of information as well as a personal and professional opinion from a medical point of view. The interview was held via e-mail and several e-mail exchanges were provided by both the thesis author and the interviewee.

The third interview was held on April 23rd with Mr Bruno Brocard, a local entrepreneur in the Champagne-Ardenne area. His interview was meant to elaborate and feed the market analysis.

The fourth interview with Mr Olivier Bruez, working for the group Valvital as the development manager was held on May 17th, 2014. The interview was supposed to happen before this date but for professional reasons, Mr Bruez was not able to be interviewed before. This was an obstacle to the thesis progress. However, the thesis author was able to get enough information and opinion from Mr Bruez. The interview was held on the phone and allowed the thesis author to ask further questions depending on the answers of Mr Bruez.

The last interview should have been held with Mrs Leilla Dorothée, consultant for the CNETH (*Conseil National des Exploitants THERmaux*) in Paris, France. However, the thesis author never received any feedback from the potential interviewee. This was also a major obstacle to the thesis progress.

For analysing the data collection, the chosen method was the summarising of the analysis of qualitative content. With this method, less relevant content of the collected data material will be passed over and the later found with the similar meanings will be used to analyse the content of data material (Flick, 2011, p.137).

The main aim of this research was to demonstrate why one station is running efficiently and the other is left to abandon, but also to highlight the key factors to the development of thermal sources and their market potential in Champagne-Ardenne area in France. Having taken this into consideration, it is logical to find certain coding units and categories for the logical interpretation of the collected material. The author of the thesis has chosen to categorise the findings under the following themes:

- Thermal potential awareness;
- Thermal source development issues;
- Key factors to success.

The problems and limitations of qualitative content analysis is that the quick categorisation of data material may obscure the view of the contents, rather than analysing the text in its depth meanings (Flick, 2011, p.139). In this research case, the interviewees' awareness and opinion was seen through both the thermal stations side, including administrative, management and medical point of views.

The research was rather narrow in its nature because only four in-depth semi-structured interviews took place. Using a mixed method both qualitative and quantitative research method gave more accurate and reliable research results. A questionnaire for the source of Sermaize-les-Bains owners would have been useful in this research. However, the thesis author encountered major troubles with this interview that could not happen for juridical/legal reasons. This is because in October 2013 the nightclub built around the thermal "*Source des Sarrazins*" had been set on fire during the night. The case has been judged as a criminal affair and recently, the owners have been judged guilty in the case as they committed arson themselves in order to get the money from the insurance company. The owner's names will remain anonymous in this paper. The interviews regarding the source of Sermaize-Les-Bains are much narrowed as the thesis author only succeeded in having an interview with the Mayor of the town. The source is

currently still in the hands of the law and might be further sold to a potential buyer, but there is still lack of information regarding this case.

The author then encountered other limitations while practising in-depth interviews. The major challenges faced during the data collecting process interviews to take place, even for online correspondence. Managers, Mayor or Doctors tend to have a busy schedule, and arranging interviews was quite challenging, even though they were located in France and shared the same language than the thesis author.

In the discussion and analysis part, differences and similarities will be drawn out for the two study cases. Some highlights of important opinions will be brought out to illustrate the analysis; these extracts from interviews are written in *italics*.

Depending on the interviewee, the questionnaire worked out differently. If it was about Bourbonne-les-Bains, Sermaize-les-Bains or Valvital group, or associated with either business success, market appeal or business failure due to lack of market appeal, the author obtained solid or vague answers (in the case of vague answers, those had to be reformulated) for every question and the discussions on theme often went on even longer than planned.

2.3 Market analysis

In order to answer the first research question on how to revitalise Sermaize-les-Bains thermal station and make it more appealing to potential clientele, a market analysis was necessary. This market analysis, whose purpose is to research how to eliminate as much risk of failure as possible by providing a clearer idea of future thermal station development, was made by the thesis author. The research enabled the author to know and understand the potential of Champagne-Ardenne area market in terms of thermal water based health tourism, to gather information needed to development recommendations, to have an overview of existing marketing choices and to determine

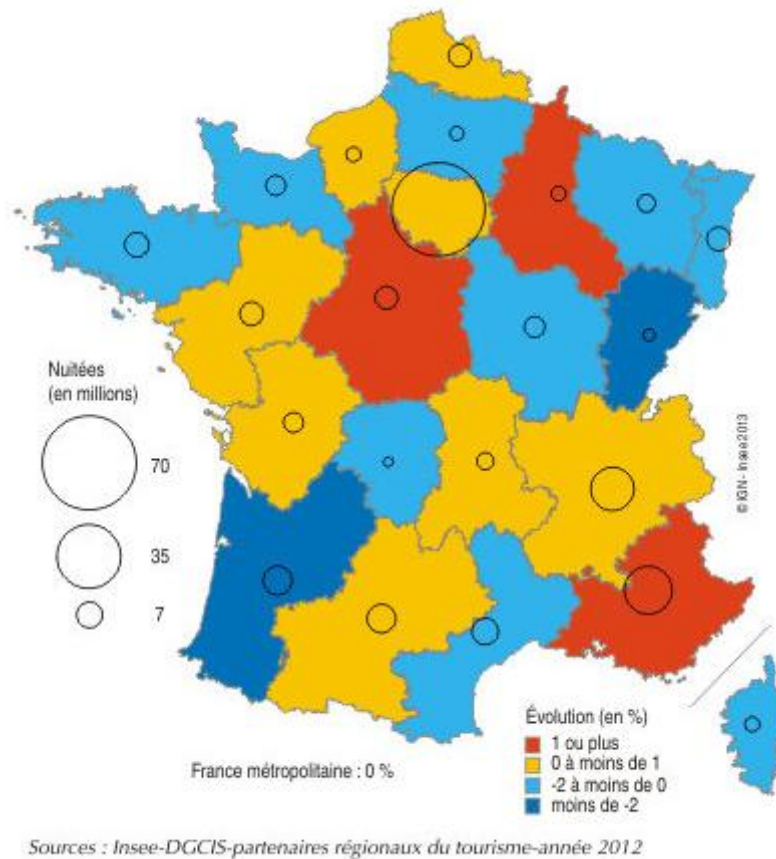
the "product", "distribution" and "communication" policies that could work in the sector of thermal tourism.

The market represents the environment that the thermal station will do business in and where supply (competitors) meets demand (potential clientele). This market is, in this thesis paper regional, as it focused on the Champagne-Ardenne area in France. Each characteristic of the market creates constraints and provides specific keys to success that will need to be identified. This stage enabled the thesis author to discover the opportunities and risks in the market and to make a decision about carrying out more research. Information needed to carry the market analysis was found by reading available materials in the chambers of commerce and industry, on the National Statistics and Economic Studies Institute (INSEE) website, in major libraries and specialised websites. The thesis author carried out a survey among the Champagne-Ardenne population in order to have the perception of locals on how the thermal tourism market could evolve in the region (see Appendix 2). This survey was answered by 60 persons residing in the region and spread on communication channels such as social media (Facebook, Google Docs, Google +, etc.) but also local tourism office. An interview of potential customers was also made with a local auto-entrepreneur from Sermaize-les-Bains, and other in-depth interviews with thermal industry professionals.

2.3.1 Champagne-Ardenne potential market

The market analysed can be listed as a leisure market even though thermalisme has a medical purpose, being a part of the wellness industry. This market is considered as growing alongside the growth of the wellness industry which is considerable in the society of today with new and different needs from customers. Furthermore, this market also fits into the expanding tourism sector. In terms of tourism, over the past ten years, while France in general has experienced a decline in tourism visits down by 8.1%, Champagne-Ardenne area has seen an increase of 2.3 %. The offer of tourism activities as well as accommodation has seen an increase by 12.4% affecting only 2.4%

of the country (INSEE, 2013). With 12 475 employed people in this sector as dated 2012, tourism represents 2.9% in Champagne-Ardenne area employment against 4.4% for the national average.

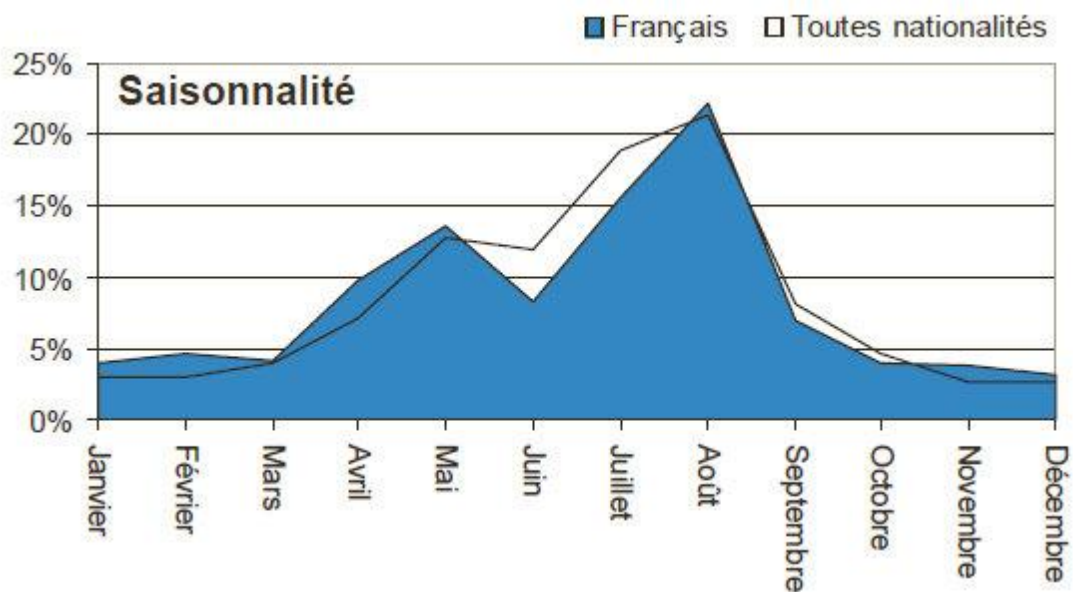


Graphic 5: Annual evolution in tourism visits in Champagne-Ardenne area between 2011 and 2012 (Source: INSEE, 2012)

As it can be seen on the graphic 5, Champagne-Ardenne area is one of the only three regions that increase its tourism visits amount by 1% and more per year in France. This result can be surprising for locals as Champagne-Ardenne is usually not seen as a very touristic region; however tourists are coming every year, even for different tourism purposes. Champagne-Ardenne area has an important advantage, which is its geographic position. The region is located at the intersection of Belgium, Germany,

Switzerland and Paris, the capital. It is also well deserved by different transportations, including the high speed train which position the area at less than 40 minutes from Paris. A day trip to the region is then on possible, giving potential visitors a good opportunity to visit Champagne-Ardenne area and eventually thermal places. Paris-Vatry airport is located 30 minutes by car and brings also lots of clients from different locations.

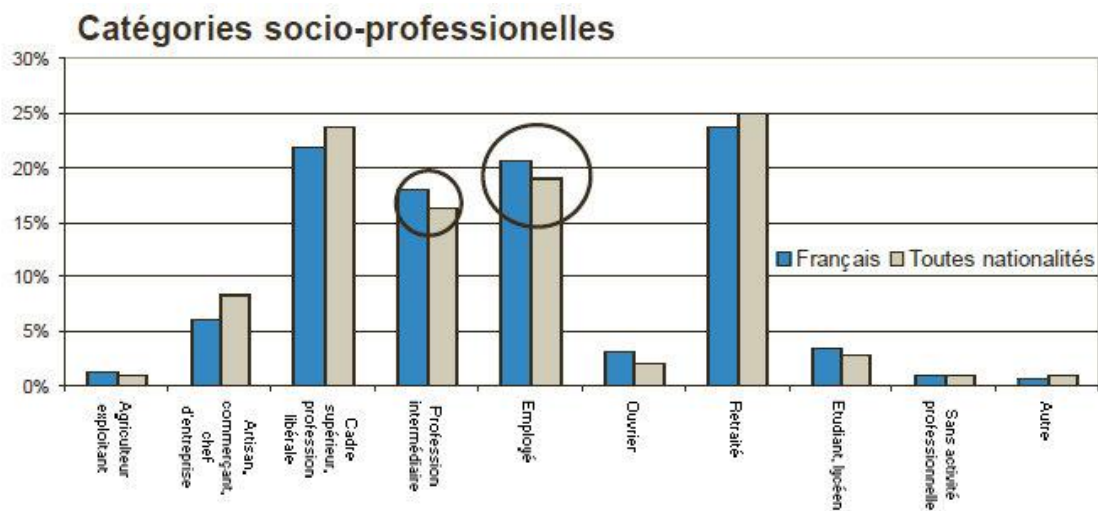
In order to understand if the thermal tourism sector could be a good investment in the area, it is also important to understand the customer and its behaviour. The seasonality, age groups, socio-professional categories, motivations to come to this area and the activities interests have been studied by the Champagne-Ardenne Tourism Observatory. A brief analysis will be explained along with the graphic representations regarding the link with the thermal industry.



Graphic 6: Seasonality for tourism in Champagne-Ardenne area (Source: INSEE, 2012)

The graphic 6 represents the seasonality in the tourism sector in Champagne-Ardenne area in France per month. The blue part represents the French visits and the black and white part the other nationalities. July and August are the peaks seasons with a record in

touristic visits. September remains high as well, due to the grape-harvest season which usually starts in August until end of September depending on the weather along the year. July and August are in France the holiday time for school as well.

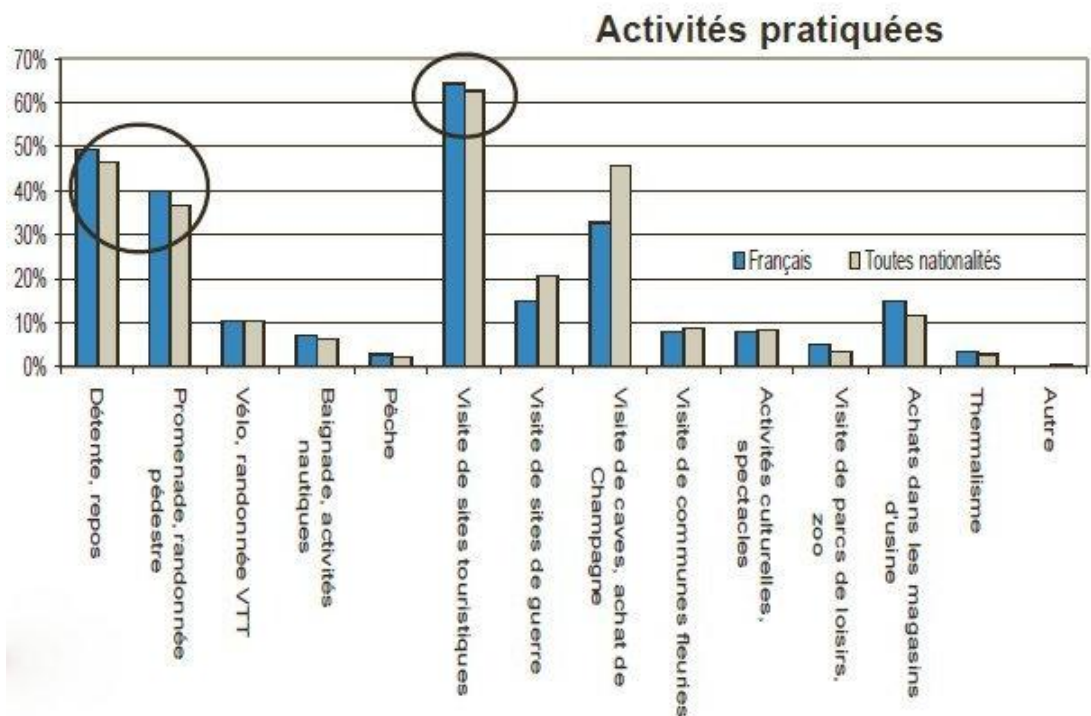


Graphic 7: Socio-professional categories (Source: INSEE, 2012)

The graphic 7 represents the socio-professional categories that visit the most Champagne-Ardenne area in 2012. According to INSEE, statistics haven't changed much in two years and these segments remains the same with a very small difference in numbers. From left to right: agriculture, artisan and company managers, executives and self-employed, employee, worker, retired person, students, unemployed, others. The segment for retired person is the highest one. Regarding age groups, the segment 50-64 years old is the one leading the market, linked to the retirement segment. The segment for self-employed and executives also represents an important part.

As thermalisme tend to have an old-image, the segment for self-employed and executives (corresponding to the segment 35-49 years old which comes juste after the segment 50-64 years old) could be new target segment to investigate for the development of thermal centres.

The different motivations were found in the study from the INSEE in 2012. The leading motivations are firstly wine (Champagne) and gastronomy, and then come historical and cultural visits, as well as the beauty of landscapes. The Champagne-Ardenne area is the home of production of Champagne which brings lots of tourists every year all year round. The region also beneficiate from a vast historical patrimony with the museums and touristic war sites from Verdun notably. Thermal activities are not listed on the motivations for tourism in this area of France. However, calm and quiet environment for tranquillity are listed and represent 30% of the tourism demand.

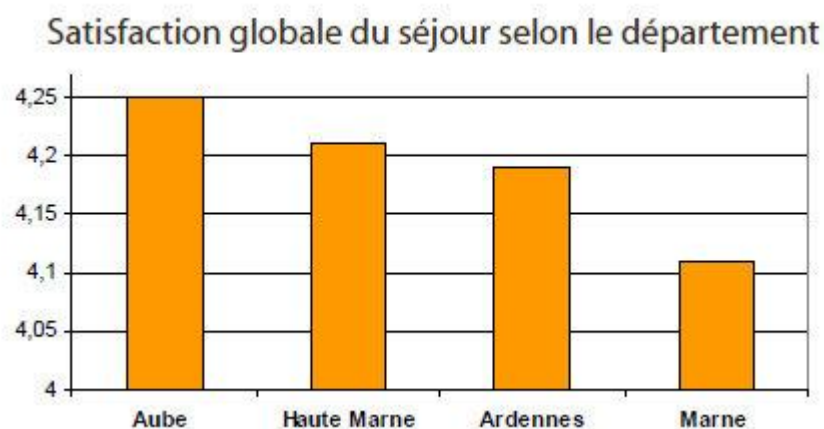


Graphic 8: Tourism activities practised in Champagne-Ardenne area (Source: INSEE, 2012)

On the graphic 8, it can be noticed that the leading segment for the study of tourism activities practiced in the region are firstly the visit of touristic sites and secondly peacefulness and relaxation, and hiking. It is surprising that the oenology and Champagne caves visits are coming on a third position as it is the main revenue for the

region. Thermalisme is listed on this graphic and represents 4% only of the tourism activities practiced.

The satisfaction of the tourists so far in the area is also an important point to review. A happy customer is a customer who will come back, which is important for the thermal industry that is targeting loyal customers, they need clients who will come back to the thermal station and have a special doctor for a better follow-up.



Graphic 9: Global satisfaction of the stay per departments of Champagne-Ardenne area (Source: INSEE, 2012).

On the graphic 9, each departments have a grade out of 5. The best grade is accorded to the department of Aube with 4.25/5, followed by Haute-Marne with 4.21/5 and Ardennes with 4.19. Marne department obtained the lowest grade with 4.11/5.

Aube obtained the best grade for welcome, sites and monuments, animations and activities but also rates. Ardennes department obtained the best grade on accommodation and Haute-Marne on the environment quality.

It can be conclude that tourists are globally satisfied with their touristic stay in the region, however, Marne department, where Sermaize-les-Bains is located, still has to improve itself on all these aspects.

In order to understand if the station of Sermaize-les-Bains would run efficiently if restored, it is also important to have an overview of the current competition. Depending on the segment Sermaize-les-Bains would choose, thermalisme or thermoludisme, competitors will be different. Bourbonne-les-Bains is presently the only thermal station in the Champagne-Ardenne area, but both stations are located in different department of the region. However, waters coming from both sources are "*almost equals but could prevent from different pathologies*" (BRGM Laboratories, 1990). As the clientele of Bourbonne-les-Bains is loyal to the station, and because personal doctors and follow-up are provided in the station, Sermaize-les-Bains would be able to create a new clientele, proper to its station alongside with new pathology treatments. As Mr Brocard explained in its interview, two stations would not be excessive as the region has a lack in terms of offers.

On the contrary, if Sermaize-les-Bains would place itself in the thermoludisme sector, the main competitor would be the thermoludique centre of Amneville-les-Thermes, located in the Lorraine region, neighbour of Champagne-Ardenne, precisely 136km from Sermaize-les-Bains. Amneville-les-Thermes is the only thermoludique centre of the North-East part of France, regrouping about 7 regions out of 27.

The thermoludique area of Amneville started in 1986 with the restoration of the thermal source, and was open to the public in 1996. The centre was named Thermapolis and Villa Pompeï, offering leisure activities at Thermapolis and thermal cures in the Villa Pompeï. The thermal cures are not conventional and not supported by the French National Social Security for the Villa Pompei. Even though Amneville-les-Thermes has a thermal source with mineral water, the centre chose to take a thermoludique turn, due to the lack of tourism activities offer in the region of Lorraine. Thermapolis and Villa Pompei bring lots of customers per year, but the financial stability of the thermal area remains fragile due to the actual crisis. However, Amneville-les-Thermes development strategy is an advantage. The group enhanced its offer by building around the thermal areas a cinema, a ski area, running in the winter time and a casino, today 4th casino of France in terms of turnover. The clientele was broadened and more day entries are sold.

Champagne-Ardenne is a great area that develops itself in terms of tourism appeal. The region brings more and more young people along the years (INSEE, 2012). People are in search of quietness and relaxation with the social conditions of today. Thermalisme would fit into this market according to the previous market analysis. In order to confirm the following hypothesis and have the point of view of a local entrepreneur in the region, Mr Bruno Brocard agreed to be interviewed. A survey has been led among the population of Champagne-Ardenne area. Outcome and questions will be developed in the following point.

2.3.2 Survey and interview analysis

A survey was led among the Champagne-Ardenne population in order to have the public opinion on how and if yes or no a thermal station could run efficiently. The survey was spread on different communication channels such as social media and Google docs, as well as local tourism office. 60 people answered the survey. A complimentary in-depth interview with a local entrepreneur was made.

The first questions were about the gender, the age and the department in the region people are living in (The region Champagne-Ardenne in France regroups 4 departments: Ardennes, Marne, Haute-Marne and Aube). 64.29% of the people who answered were feminine gender and 35.71% masculine gender. 61.90% belong to the 18-29 years old segment, 14.29% to the 29-39 years old segment, 16.67% to the 39-50 years old segment and 7.14% to the segment for 50 years old and more. 70% of the answers were from Marne department and 30% for Ardennes department. Aube and Haute-Marne population did not answer. 83.33% have been living in the Champagne-Ardenne area for more 10 years or are native from the later. It can be conclude that people who answered the survey have a special knowledge about the region.

The fifth question of the survey was about the perception of the population on Champagne-Ardenne being an active touristic area, 61.90% answered yes, 33.33% don't

think it is an active touristic area and 4.76% answered that it depends on the city in Champagne-Ardenne area.

The sixth question of the survey was about the perception of the population on Champagne-Ardenne being a touristic destination in general, to which people answered the same answer than the previous one, providing the same percentage. The Champagne-Ardenne area is so considered as a touristic place according to the majority, however the population from Ardennes department answered for most of them that it is not. Only 20% of the 60 people who answered the questionnaire are travelling for leisure purpose in Champagne-Ardenne area, nevertheless, 74.80% agree on the fact that the area would be favourable to the implementation of a thermal centre or thermal activities in general. Only 4% have already visited the thermal station of Bourbonne-les-Bains as it is for medical purpose, but 78% would be willing to visit Sermaize-les-Bains for wellness purposes with a budget up to 25 Euros on average per person. Thermoludisme would be more suitable for the local population than traditional thermalisme such as Bourbonne-les-Bains, as the day entry is more favourable for the demand and the needs. Only 24% recognized having heard about the thermal source of Sermaize-les-Bains so far.

In order to go deeper into the topic of demand, an in-depth interview was held on April 23rd, 2014, with Mr Bruno Brocard. The interview was hold in the French language and translated further into English by the thesis author. Passage from the interview translated will be quote in *italic*.

Mr Brocard is a local entrepreneur who launched his company of medical taxi services five years ago in 2009. His target market would be the medical field, his customers are people who need cares, medical visits and who need to go to the hospital frequently. He also drives people to the thermal station of Bourbonne-les-Bains for cures. Mr Brocard was born in 1964 and has been living in Champagne-Ardenne area his all life, he assured knowing the region perfectly.

According to him, the thermal source of Sermaize-les-Bains is still functional and would only need to be restored. *"A few years ago I remember, they launched the bowling centre. They were organizing dance balls and Sunday brunch, it was very nice and was bringing a lot of people to the town"*. In 1981, the family who bought the place and launched the bowling centre decided to extend the leisure place with a nightclub. *"Troubles started and the frequentation of Sermaize-les-Bains became unpopular and not recommended because of the nightclub"*. A lot of young people started to come to the nightclub, but the clientele was different from the bowling and Sunday brunches. Lots of fights were happening and the nightclub became a place *"not to be"*. It affected a lot the visits to Sermaize-les-Bains and the town economy. Last year in October 2013, a fire destroyed the nightclub and the bowling centres. However, the thermal source remains in the middle of the area, untouched.

One of the questions to Mr Brocard was, if according to him, re-starting the thermal area would be a potential springboard for the town. He assured that a new launch of the thermal source would be *"a brilliant idea"*. His arguments were that it would generate employment in the area which is missing, and it would develop the tourism industry which definitely *"need a push"* in Champagne-Ardenne region. However, he agreed on the fact that financial supplies are missing and that the main objective would be to re-create a new and positive perception of the town of Sermaize-les-Bains, as well as create a new clientele. *"The previous clientele is now old and lost, and don't believe in the thermal potential of Sermaize-les-Bains anymore"*.

The advantages of the town are qualified by Mr Brocard as *"beautiful town and architecture"*, *"quiet surrounding"*, *"forest and nature environment"*, he believes that customers would be *"happy, and expectations fulfilled by the peaceful atmosphere of the place"*. Another thermal place alongside with Bourbonne-les-Bains *"would not be too much"*. Mr Brocard also highlighted the fact that the proximity with Germany, Switzerland and Belgium is a great and valuable advantage for the region.

3. RESEARCH FINDINGS AND RECOMMENDATIONS

The following results represent the analysis of the data which was collected during the preparation of a particular research and master thesis. Research findings and recommendations will be presented. The findings include the analysis and evaluation of collected primary data. Primary data comes from the semi-structured in-depth interviews with the Major of Sermaize-les-Bains, thermal doctor from Bourbonne-les-Bains and Valvital group development manager. The findings from the interviews conducted with the Valvital group development manager reflect the experience and knowledge in terms of thermal management and Major and thermal doctor in terms of thermal implementation and efficiency.

Each interview was analysed with details (while irrelevant data were not covered) in order to compare the point of view of each professional.

The in-depth interviews were covering different themes on the thermalisme sector - Thermal potential awareness; Thermal source development issues; Key factors to success, - and were in French language. However, the author of the thesis also translated all the questions into English language in order to present it as attachment and an illustration of the original questionnaires (see Appendix 3). The author of the thesis was using illustrative examples of some tables, graphs and pictures during the interviews in

order to make the content richer and for a better understanding and visual for interviewees. All the questions were open-ended questions, for which interviewees were able to explain and develop their answer, providing more information and personal opinion, also sometimes leading to another question not prepared.

In-depth interviews are different from survey interviews in that they are less structured. In-depth qualitative interviews are flexible and continuous. They are not locked in stone and are often not prepared in advance (Kvale, S.1996).

As the interviews were qualitative, the interviewer (the thesis author) had a general plan of inquiry, however she had no specific set of questions that should have been asked with particular words and in a particular order (Kvale, S.1996). In this case, some basic questions were asked but interviews went longer than planned and other questions were further developed, according to the answers that interviewees were giving.

The author of the thesis decided to use the seven states of the complete interviewing process (Kvale, S.1996):

1. *Thematizing*: Clarifying the purpose of the interviews and the concepts to be explored.
2. *Designing*: Laying out the process through which you'll accomplish your purpose. This should also include ethical considerations.
3. *Interviewing*: Doing the actual interviews.
4. *Transcribing*: Creating a written text of the interviews.
5. *Analyzing*: Determining the meaning of the information gathered in the interviews in relation to the purpose of the study.
6. *Verifying*: Examining the reliability and validity of the information gathered.
7. *Reporting*: Telling others what you have learned or discovered.

The theme of the questions was about the development of thermal sources issues, about the awareness on thermal field and the key factors to success. Interviewees were coming from different horizons in the thermal industry and were able to give different point of views, which was very constructive for the research.

The first question was an introducing question asking interviewee to present themselves, explaining their role and functions in the company. This question was also a way to establish a first contact with the interviewee and enter in a better in-depth atmosphere in order to make the person more comfortable with the questions, the author of the thesis was then on using the *thematizing* and *designing* states of the Kvale method (Kvale, S.1996).

Among the interviewees, the first interview was held with Mrs Martine Millot on March 1st, 2014. Mrs Millot is now the Mayor of the town of Sermaize-les-Bains since April 4th, 2014; she has been elected with more than 50% of the votes. She was working alongside with the previous Major in the administration area. Mrs Millot is originally from the town of Sermaize-les-Bains where she grew up, and knows perfectly the story of this thermal source and its potential. The interview went on efficiently and the point of view of the administration for the town is a real advantage for the research. Mrs Millot is the only person that the thesis author was able to interview regarding the thermal source of Sermaize-les-Bains. She is also the only person who would be able to provide more details with regards to the future eventual projects for the source.

The second interview was held with Mrs Sylvie Barthelemy on April 1st, 2014. She is a thermal doctor in the thermal station of Bourbonne-les-Bains. She is practicing thermal medicine since 1995 and is associated with her husband who works in the same centre since 1982. They both work independently from the thermal station, being self-employed while their offices are on-site. Mrs Barthelemy receives curistes before the cure starts, she then on prescribe the appropriate treatments to patients according to their

pathology, and she then do a follow-up on the cure. In case of emergency or problems, it might happen that she needs to step-into the cure and change the treatment.

The third interview was held with Mr Bruno Brocard on April 23rd, 2014. Mr Bruno Brocard interview was meant to improve the market analysis, bringing more information and a personal opinion from a local of the region Champagne-Ardenne (See Chapter 2.3.2).

The fourth interview was held on May 17th, 2014 late in the schedule thesis plan. This interview was held with Mr Olivier Bruez and went on very well as Mr Bruez was able to provide lots of details and remarks regarding the thermal industry. He provided a personal point of view on lots of questions, based on his experience and knowledge about the field. Mr Bruez works as the development director of the group Valvital. Before that, he was the director of two different thermal stations. He now works for the development of each thermal station that Valvital has today, their dynamics on the market but also the commercial side. Mr Bruez answers to offers that thermal centres make to the group Valvital, in this case he will be in charge of studying each case and their potential. This interview was held on the phone.

In order to make the data collection more efficient, three themes were established for the in-depth interviews. The main themes were made, but then, questions in each group were not prepared in order to make interviews more spontaneous and flexible depending on answers from the interviewees. The first topic was based on the thermal potential awareness, regrouping 5 main questions. 2 questions were regarding the thermal station of Sermaize-les-Bains and 3 questions regarding Sermaize-les-Bains. The second topic was covering the thermal source development issues with a total of 7 questions, 2 questions for Bourbonne-les-Bains, 2 questions for Sermaize-les-Bains and 3 questions about thermalisme in Champagne-Ardenne in general. The third topic was covering the factors to success, including 7 questions, 4 questions for Bourbonne-les-Bains and 3 questions related to thermalisme broadly speaking.

Mrs Barthelemy, first pilot interviewee, was interviewed on this topic with regards to the thermal station of Bourbonne-les-Bains. The first question was about what makes Bourbonne-les-Bains a renowned thermal centre today.

As the later is the only thermal centre of the Champagne-Ardenne area, it was necessary to know what the key factors to the success of this source are, to be able to compare this case with the failure of Sermaize-les-Bains. *"Even though the number of visits to Bourbonne is decreasing for about 20 years, the best years of thermalisme were in the 1980's-1990"*. It seems that the situation tends to be more stable after the economical crisis of 2010, even though she affirmed that *"there are no major fluctuations for medical cures"*. According to Mrs Barthelemy, one of the most important advantages for the source of Bourbonne-les-Bains is its water properties. *"They have been healing rheumatism and fracture sequel since the Antiquity. They were already renowned for their indications from the Gaulish and the Romans"*. The *"exceptional quality"* of the waters of Bourbonne-les-Bains has proved its efficiency on different patients and pathologies so far. Mrs Barthelemy insisted on the fact that this water doesn't do any miracles but at least relieve patients from lots of pains. *"With the proof that the waters are efficient on pain, patients are coming back year after year, which is important for the thermal station"*. According to Mr Bruez, Bourbonne-les-Bains is successful thanks to its loyal customers. Indeed, he added that *"patients are loyal to their thermal stations, once they have one which suits them, they stick to it"*.

Nevertheless, it has been proved as well that the water properties of Sermaize-les-Bains source have healing particularities. In 1696, people were already talking about these waters and were coming to Sermaize-les-Bains as some scientific and doctors admitted being witnesses of the efficiency and the healing powers of the source waters (Moisset, P., 2010). In addition, a research was led from the BRGM laboratories in July 1990, providing a full report on the water. The report was not helpful to the development of the source but confirmed the quality of the water. At the time, the owner of the source started the process to settle a bottling company with the water of the source, but his

death a short time after stopped the entire project. According to the BRGM report, the property of the water has shown a perfect stability in terms of mineralization. In 1990, the laboratories was affirming that the annual volume of water available would be 23 000 meters cubed, and could reach the 87 000 meters cubed and more if the channelling system was restored. In the case the source would be re-install, administrative procedures would be simplified.

The writer of this report, Mr J. Martelet, mining engineer, concluded by saying that he would not *"insist on the advantages resulting for the country where the source is located. I will only say that its location close at hand with a railway station linking Strasbourg and Paris, and an important town nearby, not forgetting the absence of such thermal potential in a vast geographical area, would make the source more than valuable and profitable for the region Champagne-Ardenne"*.

Mrs Millot, Mayor of the town confirmed during the interview with the thesis author that she is *"aware of the fact that the source and its waters represent a real advantage for the town and the region in general"*.

She also communicate that the source is now a private property but was *"not able to divulge any other information with regards to the owner of the property and potential projects as the case is still pending with the justice"*.

Another advantage with regards to the efficiency of Bourbonne-les-Bains despite its water properties is the marketing campaign. *"For a long time, there were no advertising; recruitment was only made via word-of-mouth"*. Since Valvital bought the thermal station of Bourbonne-les-Bains, the marketing seems to be more dynamic and more advertising are made through television, and in the written press, *"highlighting the osteoporosis treatment, since Bourbonne-les-Bains has been the main favourable thermal station in the study for this pathology a few years ago"*, explained Mrs Barthelemy.

When Valvital bought Bourbonne-les-Bains, the group grew twice more efficiently, Bourbonne was the first big acquisition. The fact that this thermal station is specialised

in the rheumatology pathologies makes it a strong point for the group “*as rheumatology represents 80% of the thermal prescriptions*”, explained Mr Bruez.

Valvital group has also demonstrated its energy and strategy over the written press for a few years. When the group acquired its 10th thermal station in 2011, many marketing and sales project were drawn for the development of all the 10th stations, including Bourbonne-les-Bains. In order “*to sell, curistes need to pass through the boutique of the thermal station at least twice per day. It is common sense*” assured Bernard Riach, owner of the group (La Vie Nouvelle, 2011).

Mr Riach also took the topic further by announcing the enhancement of the offer, commercialising a new thermal cosmetic/product that the group have been working on for five years. “*We will soon have a new tool, a new product to fight off the osteoarthritis and the pain*” explained the Valvital group director (La Vie Nouvelle, 2011). Once the group will have launched this product and improve the cosmetic commercial system, Valvital wants to rejuvenate the cures. “*If a medical interest defence system is already confirmed, the development of a new concept “anti-ageing”, and the creation of “phlebotomy” cares are now in process*”.

During his interview, Mr Bruez included in the topic with regards to the marketing strategy that in order to have a marketing campaign, the keys are “*a sufficient treatments quality, a sufficient organisation in terms of welcoming the guests, a good marketing speech is primordial, the weather conditions can play a role in it but also and the most important, the tourism offer around the thermal station need to be broaden*”. These are the keys to marketing and fidelisation of a client. “*A cure is a personal choice, prescribed by the doctor, but the first idea of going to a cure comes from the patient*”. That is why marketing is important.

With the recent emergence of thermoludisme sector in the thermal industry, one of the issues for the development of thermal station could be happening in the target market or number of visits. However, Mrs Barthelemy confirmed that according to her,

thermoludisme and thermalisme have both different target market and clientele. *"As long as people need a healing treatment and are looking for a pain relief, thermalisme will work. We are in this market"*. Mrs Barthelemy perceives thermoludisme as a segment that will grow more and more, but only for healthy people in search of wellness and tourism activities. *"Bourbonne-les-Bains is clearly positioned on the medical thermalisme market; the number of visitors looking for wellness stays is very limited"*.

Mr Bruez on his side also approved the fact that thermoludisme and thermalisme are both different segments that cannot cross each other, thermalisme being in the medical market, though representing an alternative medicine as no medicines are used in thermal station. However, thermalisme and wellness are indeed connected as *"there is no thermal which does not think about its future. In every thermal station, you can find a swimming-pool with changing rooms common to thermal place and wellness area, but also the cure schedule will be arranged to have thermal treatments in the morning and wellness activities in the afternoon for example or vice versa. More and more thermal station decides to open a Spa in their centre for the wellness side"*.

As Bourbonne-les-Bains is the only thermal station in the Champagne-Ardenne area, another issue that could appear would be the competition between the potential station of Sermaize-les-Bains and the existing station of Bourbonne-les-Bains. This issue will depend on the orientation market that Sermaize-les-Bains would be willing to take. If the source is placed into the therapeutic thermalisme or into the thermoludisme sector, competitors will be different. Both segments were previously studied and analysed along the market analysis. The outcome of the market analysis in terms of competition is that Sermaize-les-Bains would be able to bring a new clientele to the region, no matter what segment the station chose to position itself in. The thermalisme segment would allow Sermaize-les-Bains to offer a different location to medical patients and so on to create a new clientele targeting different pathologies, while the thermoludique segment would offer a different location, an opportunity for a better

service/offer quality than Amneville-les-Thermes and a new tourism orientation in the Marne department of Champagne-Ardenne.

Mrs Barthelemy added to her interview that Bourbonne-les-Bains would not impede to the eventual development of Sermaize-les-Bains. *"Even though Sermaize and Bourbonne have waters with common properties, the waters from Bourbonne-les-Bains source remains unique for a particular pathology which is rheumatism"*. Sermaize-les-Bains would then on offer different treatment objectives as the waters are not exactly the same. To illustrate her remarks, she quoted the example of the thermal station in the Vosges department, region of Lorraine. The thermal station of the Vosges also participated in the study for the osteoporosis and rheumatology pathologies, and also obtained the agreement. *"While the two stations are located nearby each others, the Vosges station did not take customers from Bourbonne-les-Bains"*.

Mr Bruez added to this topic that indeed, as long as pathologies treated are different, there would be no concurrence between the two stations. *"However, it is important to have a look to the all region and east of France in general as multiple projects are in process in Alsace region and in the city of Nancy"*.

Valvital group recently bought two new thermal stations in Alsace region, and are still afraid that the thermal project of the city of Nancy would impede in their development. Bourbonne-les-Bains could also be affected if the "Nancy Thermale" project is realised in the future.

If Sermaize-les-Bains was restored, the municipality would need to have a look into the offer around the source. As Mrs Barthelemy said during the interview with the thesis author, *"Bourbonne-les-Bains runs well thanks to its efficiency, welcome quality and treatments offer. Ideally, if some tourism activities around the station were offered, curistes would enjoy the stay even more and stay longer. Our station is quiet poor in this domain"*.

Mr Bruez added to his interview that the tourism offer is necessary to the development of a source. It is important to have several and different activities to offer to the clients

when they come for a cure. The region and geographical area plays an important role, it needs to be attractive enough for the client. Accommodation need to be offered as well as treatment quality. The strength of Champagne-Ardenne area is the fact that the region grows rapidly in terms of tourism, especially gastronomy and oenology speaking. Another key factor to the success in the development of a new thermal station is the accessibility, the fact that the main target market in thermalisme sector is 50 years old and more need to be taken into consideration. The accessibility in terms of transportation to the station needs to be organised, by train, bus, car, etc., especially in the case people would travel from a far destination. The accessibility in terms of reservation and search of information as well, *“the fact that this target market doesn’t especially know how to use the internet perfectly needs to be taken in count”*. The modernity of thermal stations today can be an obstacle to the clientele if not well organised.

In the case Sermaize-les-Bains would project to restore the thermal station, *“it would be a long way to go”* according to Mr Bruez. However, it would be worthy regarding the market analysis and would answer a need. The best option for the thermal area would be to be sold to a group that would be willing to restore it, but if a private property would project to do it by itself, many different stages would apply, such as the water test, the determination of pathologies but also the zero bacteria policy that applies in France and which has a big investment cost. Mr Bruez added to the interview that the market in the north of France is attractive. It has been proved that in the north of the country, *“people are more affected by diseases and also more difficult jobs which lead to the need of treatments”*.

Further more research has been strayed from the main thesis research on purpose as the thesis author is considering it for a further PhD program.

CONCLUSION

The thermal water based health tourism varies from a country to another. In France, thermalisme has been popular for decades. Many thermal stations appeared and took an important turn in their history and fluctuations many times, notably with the convention of the French National Social Security in 1947. Many sources remained closed or abandoned due to the lack of financial supplied for most of them, or tourism offer around the thermal sources in others. Many different obstacles can occur in the process of developing a thermal area, and it is a long way to go to success in the market.

The research question was performed: “How to revitalise Sermaize-les-Bains thermal station and make it more appealing to potential clientele” and in-depth interviews were carried out with professionals such as thermal doctor, Mayor of town, development director, as well as local entrepreneur. A few obstacles were encountered during the thesis work, however, the thesis author believes these are parts of a research and further researches might be developed and carried for future professional projects.

The author had a chance to have an interview with the development director of the group Valvital, first thermal group in France and was introduced to some new project coming out in France regarding the thermal industry.

In France, many thermal stations are developed but taking the case of an old source was interesting in terms of history and future development project. Also, taking the region Champagne-Ardenne was practical, and all the interviewees had certain knowledge of the area. In addition, a visit to the “Source des Sarrazins” in Sermaize-les-Bains was possible, involving deeper details for the research.

As a result, the author of the thesis clarified the terms thermalisme, wellness and thermoludisme demonstrating the difference between the three segments and even more. Devised relevant parts of the thermal industry, its aims, services/products and personal requirements. Also, a market analysis of the potential market area was carried out and the target market segment were defined and reconfirmed. Obstacles and opportunities while launching the thermal research were explained, and this according to the current situation in the thermal water based health tourism.

It was also suggested by the author to find ways for cooperation with different parties such as a public health sector, or a thermal group willing to re-invest in the source renovation and restoration. The author is convinced that the research conducted show enough proofs and evidences how important is the thermalisme in the medical industry, as well as its development issues and key factors to success.

Put up purpose of the thesis to give recommendations for developing or restoring a new thermal station in a particular area of France were fulfilled and research task got accomplished. The author is thankful to all the interviewee’s professionals who took time and effort for present thesis research project.

In France, the thesis author’s homeland, the thermalisme is an important branch of the tourism industry. Many different old sources are abandoned while having great properties for healing different pathologies. Hopefully the ideas and suggestions turned out from this master’s thesis will inspire the Mayor’s of towns, owner of sources, directors of thermal groups, and student who are in search of ideas for future study projects, or the thesis author for a future PhD program.

APPENDICES

Appendix 1. Sermaize-les-Bains overview

Theme: a few pictures of Sermaize-les-Bains thermal sources are introduced, in order to give a better overview of the source. These pictures are dated from the 1980's and before.



Photo 1: Thermal station and source of Sermaize-les-Bains (Sermaize-les-Bains Council).



Photo 2: Popularity of the thermal station and source of Sermaize-les-Bains (Sermaize-les-Bains Council).

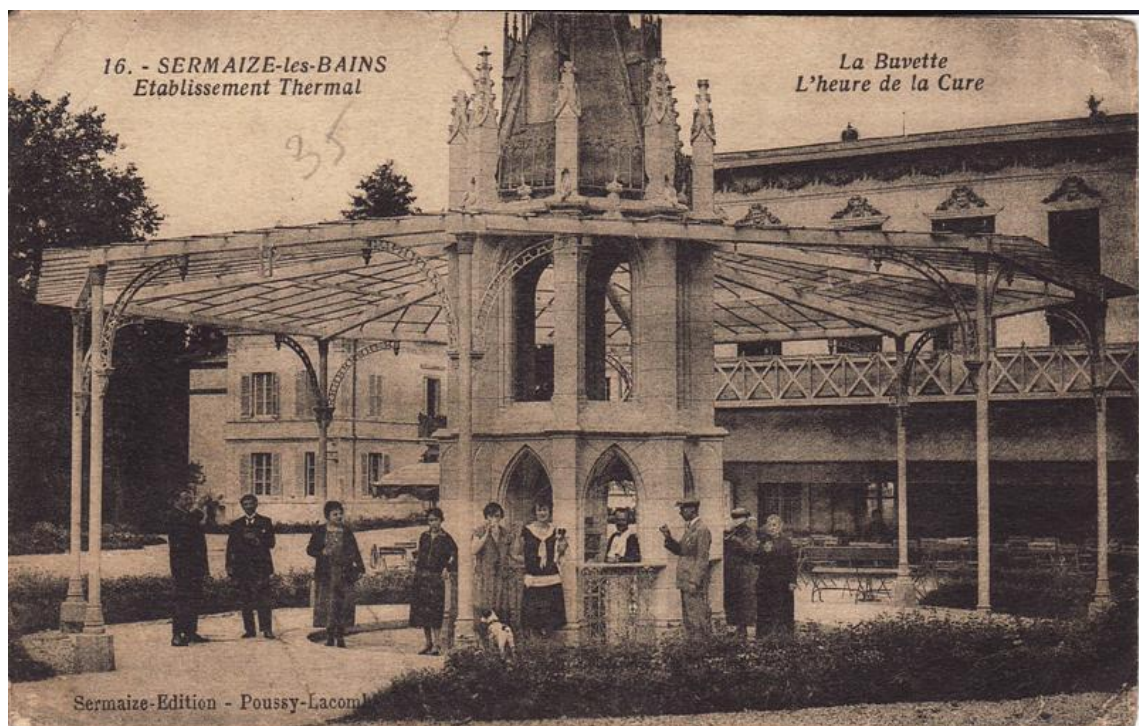


Photo 3: Thermal Source of Sermaize, “time for the cure” (Sermaize-les-Bains Council).

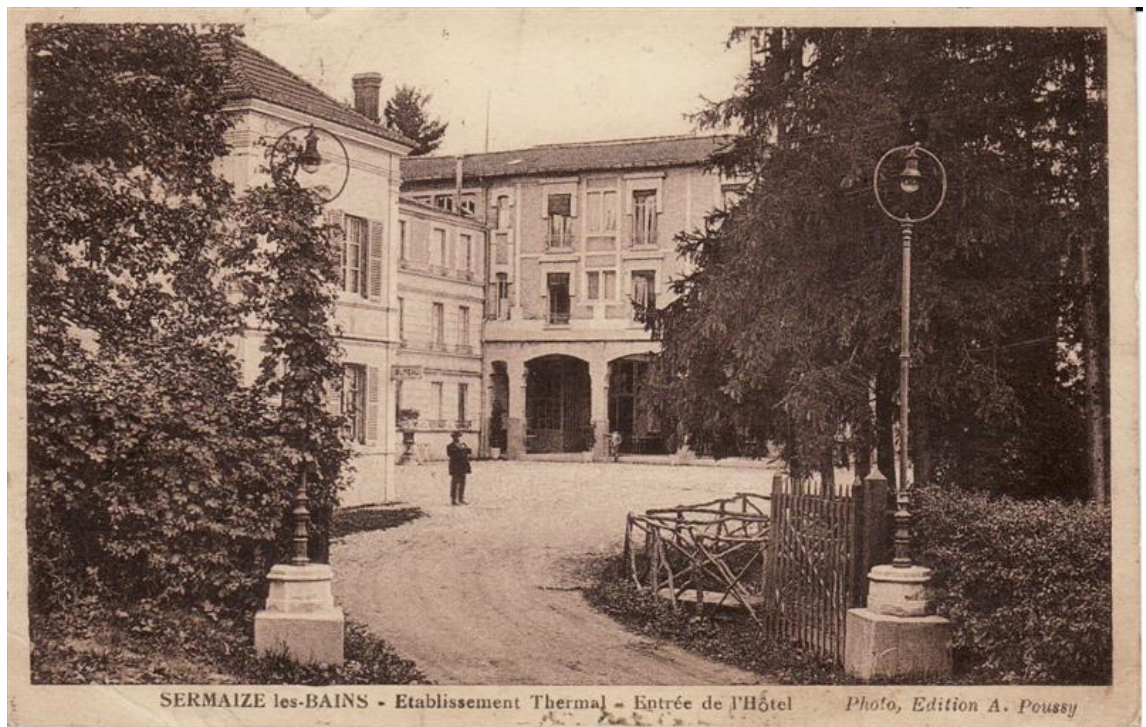


Photo 4: Entrance of Sermaize-les-Bains thermal hotel (Sermaize-les-Bains Council).

Appendix 2. Market analysis survey and local interview

Market analysis survey

1- Gender?

- ☐ Male
- ☐ Female

2- Age group?

- ☐ 18-29
- ☐ 29-39
- ☐ 39-50
- ☐ 50 and more

3- In which department of the region do you live in?

- ☐ Ardennes
- ☐ Marne
- ☐ Haute-Marne
- ☐ Aube

4- How long have you been living in this department?

- ☐ Less than 2 years
- ☐ Less than 5 years
- ☐ Less than 10 years
- ☐ 10 years or more

5- Do you perceive Champagne-Ardenne area as an active touristic region?

- ☐ Yes
- ☐ No
- ☐ Other:

6- Do you perceive Champagne-Ardenne area as a tourism destination?

- ☐ Yes
- ☐ No

7- Do you travel for leisure purpose in Champagne-Ardenne area?

- ☐ Yes
- ☐ No

8- Do you see Champagne-Ardenne area as a favourable place to the implementation of wellness and thermal activities?

- ☐ Yes
- ☐ No

9- Have you ever visited the thermal station of Bourbonne-les-Bains?

- ☐ Yes

- ☐ No
- 10- *Have you ever heard about the thermal source of Sermaize-les-Bains?*
- ☐ Yes
- ☐ No
- 11- *Would you be interested in visiting the thermal place of Sermaize-les-Bains?*
- ☐ Yes
- ☐ No
- 12- *How much would you be willing to spend per person for an entry to Sermaize-les-Bains thermal area?*
- ☐ 5 euros
- ☐ 10 euros
- ☐ 20 euros
- ☐ 25 euros and more
- 13 - *Which of the following would you be interested in in Sermaize-les-Bains?*
- ☐ Week-end (Friday to Sunday)
- ☐ Mid-week (Monday to Thursday)
- ☐ Day entry (Lunch onsite)
- ☐ Half day entry (Morning or afternoon)
- 14- *Additional comments*
- ☐ Open space:

Interview with Mr Bruno BROCARD, local entrepreneur in Champagne-Ardenne area

- 1- Could you introduce yourself briefly? What is your professional activity in Champagne-Ardenne?
- 2- For how long have you been living in this area?
- 3- As an entrepreneur, what do you think of the local economy?
- 4- Have you ever heard about Sermaize-les-Bains thermal source? If yes, what do you know about it?
- 5- Do you think the development and revitalisation of this source could be a springboard for the local economy?
- 6- According to you, what are the key to success for Sermaize-les-Bains thermal source?
- 7- What do you think would attract clientele?
- 8- In terms of tourism, do you think a thermal station in Sermaize would be a bonus for the Champagne-Ardenne area?
- 9- Do you perceive the region as potential/touristic area?
- 10- Does it have any particular advantages that would work in favour of the thermal source?

Appendix 3. In-depth interviews to managers, doctors, Mayor and consultants

Theme: Mapping the idea of market appeal and development of thermal water based health tourism from different perspectives and employment functions.

Questions:

Thermal potential awareness

- According to you, what makes Bourbonne-les-Bains a renowned thermal centre today?
- Are you aware of the thermal source in Sermaize-les-Bains? Have you heard about the history of this source?
- Do you know to whom the “Source des Sarrazins” belongs today?
- Are you aware of the medicinal properties that the Sermaize-les-Bains source has? (According to a research led by BRGM laboratories in 1990)
- How would you position Bourbonne-le-Bains today in terms of profitability (compare to the other Valvital thermal stations)?

Thermal source development issues

- Did Bourbonne-les-Bains encounter much fluctuation in terms of number of visits for treatment?
- Bourbonne-Les-Bains is the only thermal station in the Champagne-Ardennes area (thermoludique centres excluded), would you say that this could impede the emergence of competing thermal centres?
- Do you think that today thermoludisme is taking over thermalisme?
- Do you have any projects or future plans for the source of Sermaize-les-Bains?
- Do you think that Sermaize-les-Bains thermal source could represent a springboard the town if it was developed?

- According to the CNETH point of view, could you say that thermalisme in Champagne-Ardenne is successful?
- Do you think Champagne-Ardenne area in France has a big potential for thermal water based health tourism?

Key factors to success

- What would you say regarding the marketing strategy of Bourbonne-Les-Bains station? Do you highlight any particular treatment to appeal to customers?
- Would you define Bourbonne-Les-Bains more as a thermal station or a thermoludique centre? Which market segments receive more customers according to your medical point of view?
- What do you feel are the main factors dictating the development and sustained appeal of a thermal centre?
- Do you believe marketing plays an important role in terms of visits to a thermal station? If yes, can you give an example?
- What would you say regarding Bourbonne-Les-Bains marketing campaign strategy?
- How would you define a good product/service in terms of thermalisme?
- Valvital acquired Bourbonne-Les-Bains in 2004, what kind of changes did it brought/occurred to the group in terms of development?

REFERENCES

Alto Temega. (1998). *Pour une nouvelle image du thermalisme en milieu rural.*

Anne-Marie Gosselin-Verdier. (2000). Faculté de Médecine de Toulouse. *Etude de la perception du thermalisme par la population générale.*

Benedic, F., (2009, July). *Tourisme du bien-être.*

Biggam, J. (2008). Research methods. *Succeeding with your Master's dissertation. A step-by-step handbook.*

Chevillon et Calloud, *Notice sur les eaux minérales naturelles de Sermaize, leur composition chimique, leurs effets thérapeutiques et le meilleur mode de les administrer*, Paris, in 12, 1851.

C.N.E.Th. (2004, February 5). Aspects économiques du thermalisme français.

Cour des Comptes. (2006). *La gestion des Thermes nationaux d'Aix-les-Bains.* pp.505-559.

Cour des comptes. (January, 1995). Rapport public particulier. *Les interventions publiques dans le domaine du thermalisme.*

Dacharry, M., (1965). Le tourisme social (Association française des Experts scientifiques du tourisme). In : *Revue de géographie alpine*. Tome 53 N°4. pp. 633-641.

Delomenie, P., (2000, October). *Rapport sur le thermalisme Français.*

DGCIS

[http://www.dgcis.gouv.fr/files/directions_services/tourisme/acteurs/cnt/rapport-stat-therm.pdf] Reviewed on 03.04.2014

E. Baugier, *Traité des eaux minérales d'Attaucourt en Champagne avec quelques observations sur les eaux minérales de Sermaize*, Châlons, 1696.

Flick, U. (2011). *Introducing research methodology: A beginner's guide to doing a research project*. London: SAGE Publications Ltd.

Horowitz A. (2007). *Anthropomorphism*. In M. Bekoff, ed., *Encyclopedia of Human-Animal Relationships*, pp 60-66, Greenwood Publishing Group, Westport, CT.

IMJT (2010) [<http://www.imtj.com/articles/2010/medical-tourism-products-30038/>]. Reviewed on May 12th, 2014.

International Spa Association. [<http://www.experienceispa.com/>] Reviewed on May 1st; 2014.

Ion M. (1968, December 5). Le journal de médecine de Lyon. *Quelques problèmes de sociologie appliquée à l'existence et au développement du thermalisme et des stations thermales*. Aix-les-Bains.

Jacques P., (2004) « Le voyage aux eaux. Histoire de la desserte ferroviaire des stations thermales (1937-2002) », *Revue d'histoire des chemins de fer*.

Jamot C., (1975). L'organisation du quartier central des villes thermales françaises (d'après l'exemple d'Aix-les-Bains). In: *Revue de géographie alpine*. Tome 63 N°4. pp. 491-509.

Jamot, C., (1988). Thermalisme et villes thermales, *Institut du Massif Central*, Clermont-Ferrand.

Janin B., (1955). L'évolution récente d'une grande station thermale et sa démocratisation : Aix-les-Bains. In: *Revue de géographie alpine*. Tome 43 N°3. pp. 663-671.

Journal International de Médecine [<http://www.jim.fr/>] (2010). Reviewed on April 22nd, 2014.

Kvale, S. (1996). *Interviews: An Introduction To Qualitative Research Interviewing*. Sage Publications.

La Vie Nouvelle. [<http://www.la-vie-nouvelle.fr/actualite/15-millions-d-euros-pour-les-thermes-d-Aix-les-Bains-3072.html>] Reviewed on May 1st, 2014.

Lesechos.fr. (2013). *Stations thermales : le nombre de curistes ne faiblit pas*.

Lohez, M., (2000). Thermalisme et tourisme : les évolutions récentes en France. In : *L'information géographique*. Volume 64 n°4. pp. 314-321.

Mesplier-Pinet, J., (1990). Thermalisme et curistes : les contraintes. *Tourism Review*, Vol.45 Iss : 2, pp.10-17.

Michael D. Horowitz, MD, MBA; FACS, Research Associate, Jeffrey A. Rosensweig, PhD, Associate Professor of International Business and Finance and Director, and Christopher A. Jones, DPhil, MSc, FRSM, Research Associate (2007). "*Medical Tourism: Globalization of the Healthcare Marketplace*". MedGenMed. Retrieved 16 September 2012.

Ministère de l'Industrie. (1963, April 25). Journal officiel de la République Française, *Convention Collective*. pp.3812.

Ministère de l'Industrie. (1963, December 27). Journal officiel de la République Française, pp.11719.

Ministère de la santé publique et de la population. (1960, June 9). Journal officiel de la République Française. pp. 5180.

Ministère de la santé publique et de la population. (1947, July 8). Journal officiel de la République Française. pp. 6409.

Penez, J., (2004). Les réseaux d'investissement dans le thermalisme au XIXe siècle en France. *Les réseaux des villégiatures*.

Perrin, A., (1934). Caractères géographiques de sa vie thermale. In: *Les Études rhodaniennes*. Vol. 10 n°3-4, pp. 163-214.

Roux, L., (2008-2009). Le thermalisme européen au XVIII^e siècle. *Mémoire*.

Sermaize-les-Bains. [www.ville-sermaize-les-bains.fr/component/option.../gid,74/]
Reviewed on April 1st, 2014.

Smith, M.;& Puczkó, L. (2009). *Health and wellness tourism*. Oxford: Elsevier Ltd.

The Economics Times.
[<http://economictimes.indiatimes.com/configspace/ads/defaultinterstitial.html>].
Reviewed on April 22nd, 2014.

Tamarozzi, F., (2006). Mettre la pression ou faire pression ? La Relation entre masseur et massé dans le contexte de la cure thermale à Aix-les-Bains. *Corps*, N°1, pp.111-116.

Valvital, Bourbonne-les-Bains [<http://www.valvital.fr/stations-thermales/bourbonne-les-bains/accueil-bourbonne-les-bains.html>] Reviewed 01.04.2014

Veal, A. J. (2011). *Research methods for leisure and tourism: Practical guide*. Essex: Pearson Education Limited.

Violier, P., Jamot C., (1997). Les activités liées à l'eau, les stations thermales, *Atlas de France, Tourisme et loisirs*.

RESUME EN FRANCAIS

Les origines du thermalisme, l'usage des eaux minérales à des fins thérapeutiques, remontent au temps Gallo-Romain. Au fil des années, cette technique a rencontrée plusieurs hauts et bas en termes de fréquentation, de popularité mais aussi de crédibilité, soumis remis en doute. Après avoir été oubliée et abandonnée pendant des siècles, c'est en 1831 que cette technique est réapparue et a fait ses preuves avec l'ouverture et le développement de nouvelles infrastructures thermales.

Bien que l'usage de ces eaux remonte en réalité à 3000 A-C, l'Histoire des bains thermaux a commencée à l'Antiquité en Grèce (Chagnon, A., 2009), avec aux premiers abords, un objectif d'hygiène. Lentement, les bains thermaux ont pris une place importante dans le monde social et ont commencés à se développer en termes d'architecture, les détails se sont fait de plus en plus précis, les bains étaient donc un endroit où les gens se retrouvaient pour discuter et se détendre, enfin, une place commune.

Avec l'occupation Romaine, des bains thermaux ont été construits un peu partout dans l'Empire Romain. En 1604, la première "Charte des Eaux Minérales" fut signée par Henri IV, Roi de France à l'époque. A la fin du XVIIIème siècle, les constructions prennent un tournant phénoménal. Les centres thermaux deviennent des endroits prisés et souvent les plus imposants, comparé aux sources thermales qui elles, sont couvertes et protégées par de petits pavillons ou kiosques. En France, les goûts de Napoléon III et de sa famille jouent un rôle important et déterminant dans le « boom » du thermalisme

après 1850. Le sommet de ce renouveau est atteint à Vichy à la fin de ce siècle avec la réalisation des projets de Charles Lecoeur (Chagnon, A. 2009).

Aujourd'hui, la France est le troisième pays thermal après l'Allemagne et l'Italie, avec approximativement 570 000 curistes par an pour 115 stations thermales reconnues. Rhumatologie et maladies respiratoires sont les prescriptions les plus communes pour les cures thermales, qui représentent 80% des prescriptions thermales. Chaque source minérale opérationnelle doit être autorisée par un décret ministériel et doit être spécialisée dans une ou plusieurs pathologies afin d'être conventionnée par la Sécurité Sociale.

La Champagne-Ardenne en France n'est pas la première destination qui viendrait en tête pour le thermalisme aujourd'hui, cependant, elle était à l'époque une région très prisée et reconnue pour ces vertus thermales aujourd'hui oubliées. Les deux études de cas étudiées dans ce mémoire sont situées en Champagne-Ardenne, la première à Bourbonne-les-Bains, la deuxième à Sermaize-les-Bains, dans la même zone géographique.

Ces deux zones thermales ont toutes deux une longue histoire derrière elles et ont vécu de nombreux événements historiques importants pour en arriver où elles en sont au jour d'aujourd'hui. Cette recherche portant sur les deux sources thermales était très intéressante et a démontrée que les eaux des ces deux sources étaient en fait similaires et à la fois bien différentes, dans la même région géographique et pourtant, l'une d'entre elle a du succès et l'autre a été abandonnée il y a plusieurs années.

Selon la revue littéraire effectuée auparavant, l'auteur de ce mémoire peut en conclure que plusieurs recherches concernant le développement de stations thermales ont été faites, mais aucune ne se concentre sur l'attractivité du marché et aucune comparaison n'a été faite entre les cas succès/échec des sources thermales. Cette étude pourra donc contribuer à l'amélioration et/ou développement et aux problèmes liés à l'attractivité des stations thermales en France et à l'étranger.

L'équivalent du titre de ce mémoire de Master en français pourrait être : « *Développer l'attractivité du tourisme thermal : Comparaison dans la région Champagne-Ardenne, France* ». La problématique que ce mémoire se pose est: comment rendre les stations thermales plus attractives pour la clientèle et quels sont les facteurs clés jouant dans le développement du tourisme thermal en France ?

L'auteur de ce mémoire formulera des hypothèses basées sur la revue littéraire et la culture générale dans le domaine du tourisme thermal en France : l'engagement et le savoir général en matière de potentiel thermal à Sermaize-les-Bains (première étude de vas) est insuffisant et ne peut avancer ou se développer en vue de nouveaux projets positifs pour la ville. L'objectif final de ce mémoire est d'étudier les deux zones thermales situées dans la même zone géographiques en France, et de découvrir comment l'une s'opère avec succès et l'autre non, et comment y remédier.

Afin d'atteindre ces objectifs et la conclusion de ce mémoire, l'auteur de celui-ci à menée plusieurs recherches. Un plan théorique et quelques définitions générales sur le domaine du tourisme thermal et du thermalisme seront présentés plus loin dans ce mémoire. Le passé historique de ces deux stations sera également et brièvement présenté afin d'obtenir une meilleure perspective des positions qu'occupaient ces deux sources sur le marché thermal d'antan et d'aujourd'hui.

La méthode de recherche choisie est une méthode qualitative. L'auteur de ce mémoire à privilégier les interviews personnelles avec des professionnels du secteur plutôt que la quantité avec des questionnaires public. Les interviews menées étaient sous forme de discussions, les questions ouvertes étaient favorisées afin que l'interrogé puisse élargir sa réponse et donner son point de vue personnel. Les interviews ont été menées parmi des managers, consultants, Maire et médecin thermal. En addition à ces interview, l'auteur à pu se rendre sur la zone géographique et observer l'architecture de la source thermale de Sermaize-les-Bains. Une analyse de marché de la Champagne-Ardenne est également présentée dans ce mémoire.

Ce mémoire est divisé en trois principaux chapitres : le premier chapitre présente le passé historique et théorique du tourisme thermal en France, une introduction aux futures tendances de ce marché, les variations en termes de fréquentation et le développement de produits et services du secteur thermal ; le deuxième chapitre porte sur la recherche des deux études de cas et analyse des données recueillies ; le troisième chapitre porte sur les recommandations où l'aboutissement final de ce mémoire sera également présenté. La dernière partie du mémoire comporte la conclusion, la liste des références, les annexes pour alimenter les recherches de ce mémoire et ce résumé dans la langue Française.

Non-exclusive licence to reproduce thesis and make thesis public

I, Violaine MALIE,

1. herewith grant the University of Tartu a free permit (non-exclusive licence) to:
 - 1.1. reproduce, for the purpose of preservation and making available to the public, including for addition to the DSpace digital archives until expiry of the term of validity of the copyright, and
 - 1.2. make available to the public via the web environment of the University of Tartu, including via the DSpace digital archives until expiry of the term of validity of the copyright,

“Developing the attractiveness of thermal water based health tourism: A comparison in Champagne-Ardenne area, France”,

Supervised by **Dr. Laszlo Puczko**

2. I am aware of the fact that the author retains these rights.
3. I certify that granting the non-exclusive licence does not infringe the intellectual property rights or rights arising from the Personal Data Protection Act.

Pärnu,